

2017 City of Concord Citizen Survey

...helping organizations make better decisions since 1982

Final
Report

Submitted to the City of Concord, North Carolina

by:

ETC Institute
725 W. Frontier Lane,
Olathe, Kansas
66061

January 2018



2017 City of Concord Citizen Survey

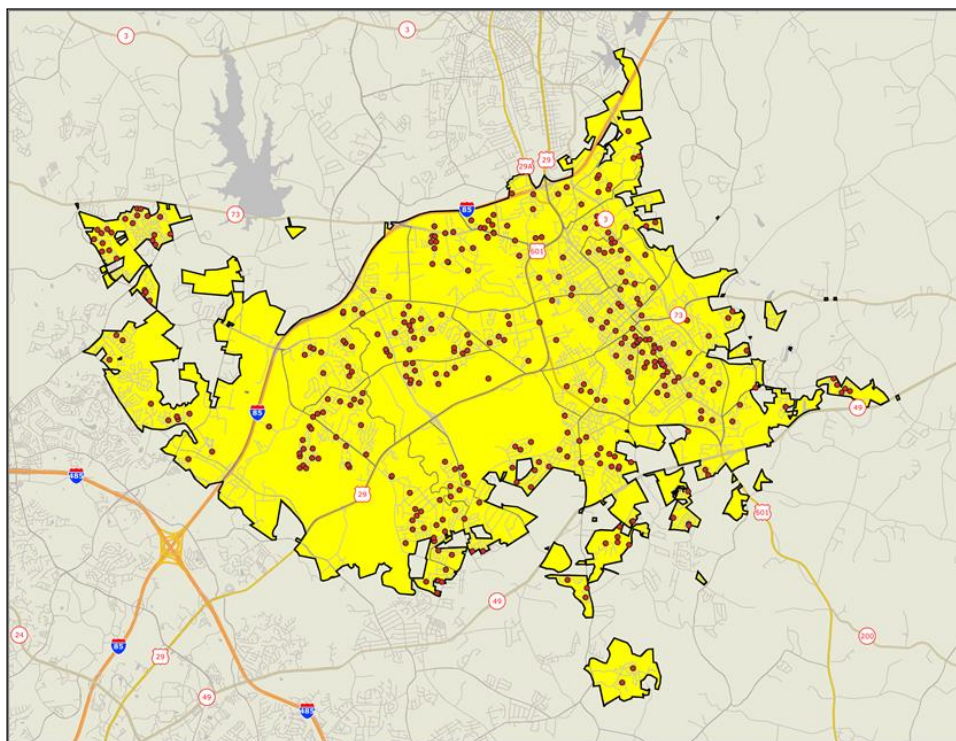
Executive Summary Report

Overview and Methodology

Overview. During the fall of 2017, ETC Institute administered a citizen survey for the City of Concord. The purpose of the survey was to gather input from residents on service quality, priorities and overall performance. This is the first year ETC Institute has administered a community survey for the City of Concord.

Methodology. A seven-page survey was mailed to a random sample of households throughout the City of Concord. The mailed survey included a postage-paid return envelope and a cover letter. The cover letter explained the purpose of the survey, encouraged residents to return their surveys in the mail, and provided a link to an online survey for those who preferred to fill out the survey over the internet.

The goal was to receive at least 400 completed surveys. This goal was met, with a total of 401 households completing a survey. The results for the random sample of 401 households have a 95% level of confidence with a precision of at least $\pm 5.0\%$. There were no statistically significant differences in the results of the survey based on the method of administration (mail vs. online). To ensure that households throughout the City were well represented, ETC Institute geocoded the home address of respondents to the survey. The map below shows the physical distribution of survey respondents based on the locations of their homes.



Interpretation of “Don’t Know” Responses. The percentage of “don’t know” responses has been excluded from many of the graphs in this report to assess satisfaction with residents who had used City services and to facilitate valid comparisons with other communities in the benchmarking analysis. Since the number of “don’t know” responses often reflects the utilization and awareness of City services, the percentage of “don’t know” responses has been included in the tabular data in Section 4 of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase “who had an opinion.”

This report contains the following:

- a summary of the methodology for administering the survey and major findings
- charts showing the overall results for the survey (Section 1)
- benchmarking data that show how the results for the City of Concord compare to other U.S. communities (Section 2)
- Importance-Satisfaction analysis that identifies priorities for investment (Section 3)
- tabular data showing the overall results for all questions on the survey (Section 4)
- a copy of the cover letter and survey instrument (Section 5)

GIS maps and crosstabular data by key demographic variables are published separately as Appendices A and B.

Major Findings

- **Overall Satisfaction with Major City Services.** Most residents (91%), *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of fire services and fire department response to medical emergencies. Other major City services that respondents are satisfied with include: overall quality of parks and recreation programs and facilities (86%), overall appearance of City facilities (82%), overall quality of police services (81%), and overall quality of customer service received (81%). Residents were least satisfied with flow of traffic and the ease of getting around the City (46%).
- **Major Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the major services that respondents feel are most important for the City to emphasize over the next two years are: 1) flow of traffic and the ease of getting around the City, 2) maintenance of streets, sidewalks, and infrastructure, and 3) overall quality of economic development.

- **Satisfaction with Items That Influence Perceptions of the City.** Ninety percent (90%) of respondents, *who had an opinion*, rated the City of Concord as “excellent” or “good” (rating of 4 or 5 on a 5-point scale) as a place to live; 86% gave the City “excellent” or “good” ratings for overall quality of life, and 86% gave the City “excellent” or “good” ratings for the overall impression of the community. Residents were least satisfied with the perception of how well the City is managing growth (54% “excellent” or “good”).
- **Satisfaction with Public Safety and Emergency Services.** Eighty-nine percent (89%) of respondents, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the overall quality of fire services; 89% were satisfied with how quickly fire personnel respond; 87% were satisfied with the professionalism of fire personnel, and 83% were satisfied with the overall quality of local police protection. Residents were least satisfied with City efforts to ensure the community is prepared for a natural disaster or crisis.
- **Public Safety Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the public safety services that respondents feel are most important for the City to emphasize over the next two years are: 1) overall efforts by the City to prevent crime, 2) visibility of police in neighborhoods, and 3) City efforts to ensure the community is prepared for a natural disaster or crisis.
- **Perceptions of Safety.** Ninety-four percent (94%) of the respondents, *who had an opinion*, felt “very safe” or “safe” in their neighborhood during the day, 82% felt safe overall in the City of Concord, and 80% felt “very safe” or “safe” in their neighborhood during the night.
- **Satisfaction with Transportation and Roadway Services.** Three-fourths (75%) of respondents, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the maintenance of streets signs; 71% were satisfied with the cleanliness of streets and other public areas; 67% were satisfied the ease of traveling from home to regional roadways, and 64% were satisfied with the condition and maintenance of streets in their neighborhood. Residents were least satisfied with on-street bicycle infrastructure (38%).
- **Transportation and Roadway Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the maintenance services that respondents feel are most important for the City to emphasize over the next two years are: 1) ease of getting across town in Concord, 2) traffic signal coordination on major streets, and 3) adequacy of street lighting.

- **Satisfaction with Neighborhood Services.** Seventy-five percent (75%) of the residents surveyed, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the appearance of their neighborhood; 60% were satisfied with the enforcement of sign regulations; 56% were satisfied with the enforcement of the mowing and cutting of weeds on private property, and 53% were satisfied with the enforcement of the exterior maintenance of residential property. Residents were least satisfied with the availability of affordable rental housing (28%).
- **Neighborhood Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the neighborhood services that respondents feel are most important for the City to emphasize over the next two years are: 1) availability of affordable rental housing, 2) availability of affordable housing for purchase, and 3) enforcement of the clean-up of junk cars and debris on private property.
- **Satisfaction with Environmental and Utility Services.** Eighty-seven percent (87%) of the respondents, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with residential trash collection service; 83% were satisfied with curbside recycling service; 80% were satisfied with the reliability of water service, and 80% were satisfied with the courtesy of field employees. Residents were least satisfied with the taste/odor of their drinking water (53%).
- **Environmental and Utility Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the environmental and utility services that respondents feel are most important for the City to emphasize over the next two years are: 1) taste/odor of drinking water, 2) value received for electrical utility rates, and 3) how quickly the City restores power.
- **Satisfaction with City Leadership and Communication.** Seventy-three percent (73%) of the respondents, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the quality of printed materials they receive from the City; 66% were satisfied with the leadership of elected officials, and 65% were satisfied with the leadership of the City Manager and appointed staff. Residents were least satisfied with the level of public involvement in local decision making (48%).
- **Satisfaction with Parks and Recreation Services.** Eighty-nine percent (89%) of residents, *who had an opinion*, were satisfied (rating of 4 or 5 on a 5-point scale) with the appearance/maintenance of City parks; 83% were satisfied with the quality of facilities at City parks; 77% were satisfied with the number of City parks, and 76% were satisfied with

the quality of walking/biking trails in the City. Residents were least satisfied with aquatic based programs (49%).

- **Parks and Recreation Services That Should Receive the Most Emphasis.** Based on the sum of their top three choices, the parks and recreation services that respondents feel are most important for the City to emphasize over the next two years are: 1) number of walking/biking trails, 2) special events and festivals in the City, and 3) appearance/maintenance of City parks.
- **Importance of Various Aspects of Quality of Life.** Most (91%) of the respondents surveyed, *who had an opinion*, indicated that safety and security were “very important” or “somewhat important” in their decision to live in their community (rating of 3 or 4 on a 4-point scale). Other characteristics that residents felt were “very important” or “somewhat important” include: quality of housing (90%), types of housing (87%), access to quality shopping (85%), and quality health care (84%). Residents felt the least important characteristic in deciding where to live was public transportation (51% “very important” or “somewhat important”).
- **Quality of Life Needs That Are Being Met.** Eighty-six percent (86%) of residents surveyed, *who had an opinion*, indicated that safety and security was meeting their needs in the City of Concord. Other characteristics that residents felt were being met in the City include: access to quality shopping (85%), accessibility to airport and other communities (85%), availability of parks and recreation opportunities (84%), and quality health care (82%). Residents felt their public transportation needs were being met the least in the City of Concord (60%).
- **Importance of Various Issues for the Future.** Most (96%) of residents surveyed, *who had an opinion*, indicated that supporting small/local businesses was a “very important” or “important” issue to the City of Concord in the coming years (rating of 4 or 5 on a 5-point scale). Other issues that respondents indicated were “very important” or “important” to the future of the City include: maintaining an adequate and healthy water supply (95%); improving traffic flow around the City (94%); maintaining a fiscally sound City budget (93%); keeping taxes low (93%); improving road infrastructure/maintenance (92%), and improving public safety and crime prevention (92%). Residents felt improving stormwater management was the least important issue to the City in the coming years (69% “very important” or “important”).

Other Findings

- Sixty-eight percent (68%) of respondents surveyed felt that direct mailings were a good way to get information about City projects or issues. Other ways that residents preferred to get information include: City website (52%), social media (39%), and radio/television (32%).
- Nearly two-thirds of residents (64%), *who had an opinion*, felt “very informed” or “informed” about the City of Concord and its services; 32% felt “not very well informed” and 4% felt “completely uninformed.”
- Forty-six percent (46%) of respondents indicated they had called the City’s Customer Care Center within the past year. Of those, 79% said their concern was resolved the first time during their most recent call. Additionally, 78% indicated they waited 5 minutes or less before speaking with a representative during their most recent call; the mean wait time was 2.05 minutes.

How Concord Compares to Other Communities

Concord **rated at or above the Atlantic Regional average** in 64 of the 69 areas that were assessed. The states that make up the Atlantic Region are North Carolina, Virginia, West Virginia, Delaware, Maryland, District of Columbia, and New Jersey. Concord rated significantly higher than the Atlantic Regional average (5% or more above) in 52 of these areas. The areas in which Concord rated at least 15% above the Atlantic Regional average are listed below and on the following page:

- Overall quality of customer service received from City employees (+36%)
- Leadership of elected officials (+29%)
- Overall quality of City services (+28%)
- Leadership of City Manager and appointed staff (+27%)
- Bulk trash pickup/removal service (+24%)
- Overall impression of the community (+21%)
- Value received for tax dollars and fees (+21%)
- Enforcement of the mowing and cutting of weeds on private property (+21%)
- Overall effectiveness of City communication with the public (+20%)
- Overall quality of the City’s stormwater management system (+20%)
- Overall quality of City parks and recreation programs and facilities (+19%)
- Overall ratings of the City as a place to live (+19%)
- City efforts to keep residents informed about local issues (+19%)

- Timeliness of water/sewer line break repairs (+18%)
- Cleanliness/maintenance of neighborhood stormwater drains (+18%)
- Quality of facilities at City parks (+17%)
- Overall maintenance of City streets, sidewalks, and infrastructure (+16%)
- Overall ratings of the City as a place to raise children (+16%)
- Condition/maintenance of neighborhood streets (+16%)
- Leaf, yard waste and brush removal services (+16%)
- Overall efforts by the City to prevent crime (+15%)
- Appearance/maintenance of City parks (+15%)
- Quality of walking/biking trails in the City (+15%)

Concord **rated above the National average** in 63 of the 69 areas that were assessed. Concord rated significantly higher than the National average (5% or more above) in 55 of these areas. The areas in which Concord rated at least 15% above the National average are listed below and on the following page:

- Overall quality of customer service received from City employees (+34%)
- Overall quality of City services (+30%)
- Leadership of City Manager and appointed staff (+28%)
- Leadership of elected officials (+26%)
- Bulk trash pickup/removal service (+25%)
- Enforcement of the mowing and cutting of weeds on private property (+25%)
- Overall effectiveness of City communication with the public (+25%)
- Overall impression of the community (+22%)
- Value received for tax dollars and fees (+22%)
- Overall quality of City parks and recreation programs and facilities (+22%)
- Overall ratings of the City as a place to live (+20%)
- City efforts to keep residents informed about local issues (+19%)
- Quality of facilities at City parks (+19%)
- Appearance/maintenance of City parks (+19%)
- Overall maintenance of City streets, sidewalks, and infrastructure (+19%)
- Leaf, yard waste and brush removal services (+18%)
- Overall efforts by the City to prevent crime (+18%)
- Timeliness of water/sewer line break repairs (+18%)
- Cleanliness/maintenance of neighborhood stormwater drains (+18%)
- Quality of walking/biking trails in the City (+17%)
- Overall ratings of the City as a place to work (+17%)
- Overall ratings of the City as a place to raise children (+16%)
- Condition/maintenance of neighborhood streets (+16%)

- Availability of information about City programs/services (+16%)
- City public safety education programs, including school-based programs (+15%)
- Level of public involvement in local decision making (+15%)

Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the City identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance that residents placed on each City service and the level of satisfaction with each service.

By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services over the next two years. If the City wants to improve its overall satisfaction rating, it should prioritize investments in services with the highest Importance Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in the Section 3 of this report.

Based on the results of the Importance-Satisfaction (I-S) Analysis, ETC Institute recommends the following:

- **Overall Priorities for the City by Major Category.** The first level of analysis reviewed the importance of and satisfaction with major categories of City services. This analysis was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended as the top two priorities for investment over the next two years in order to raise the City's overall satisfaction rating are:
 - Overall flow of traffic and the ease of getting around the City (I-S Rating=0.2614)
 - Overall maintenance of City streets, sidewalks, and infrastructure (I-S Rating=0.1408)
- **Priorities within Departments/Specific Areas:** The second level of analysis reviewed the importance of and satisfaction of services within departments and specific service areas. This analysis was conducted to help departmental managers set priorities for their department. Based on the results of this analysis, the services that are recommended as the top priorities within each department/area over the next two years are listed below:
 - **Public Safety and Emergency Services:** City efforts to ensure the community is prepared for a natural disaster or crisis

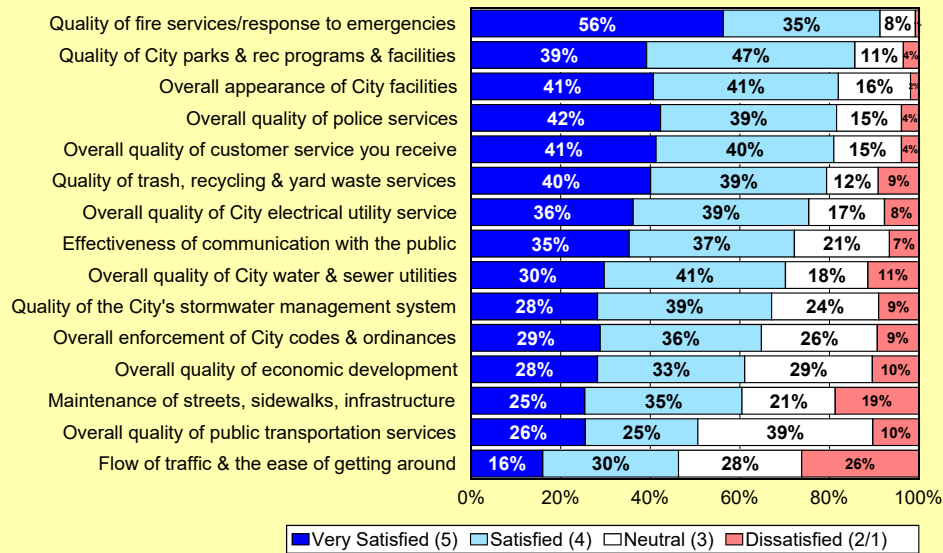
- **Transportation and Roadway Services:** ease of getting across town
- **Neighborhood Services:** availability of affordable rental housing and availability of affordable housing for purchase
- **Environmental and Utility Services:** taste/odor of drinking water
- **Parks and Recreation Services:** none of the parks and recreation services were selected as a “high priority” for improvement

Section 1:

Charts and Graphs

Q1. Overall Satisfaction with City Services by Major Category

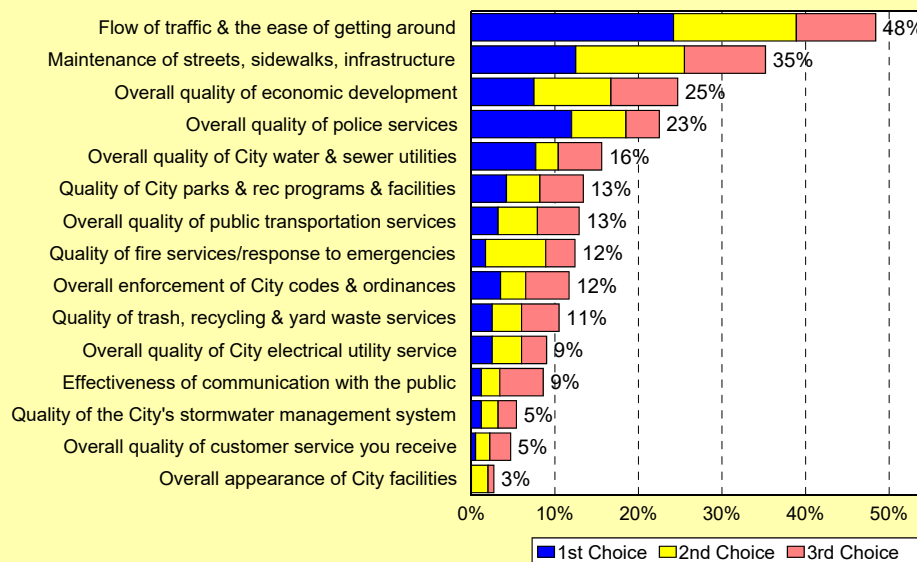
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q2. City Services That Should Receive the Most Emphasis Over the Next Two Years

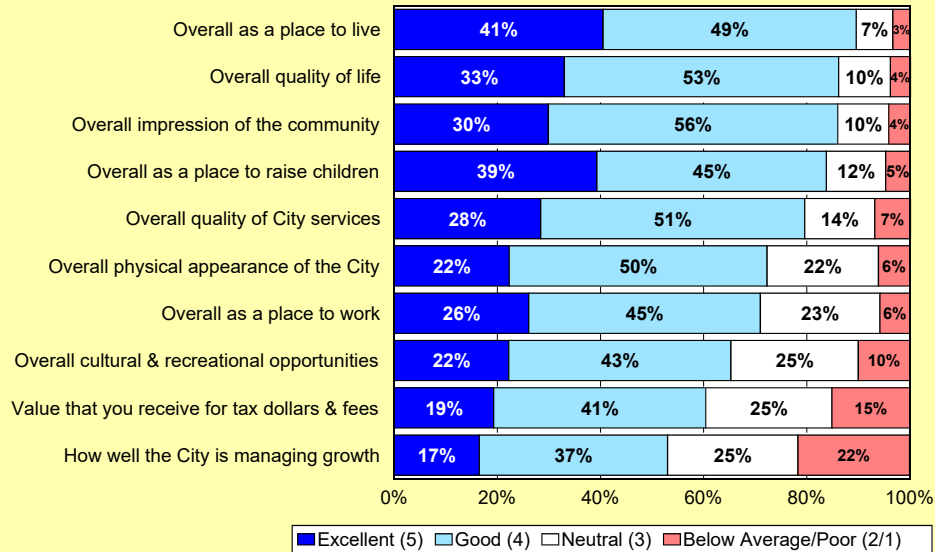
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2017)

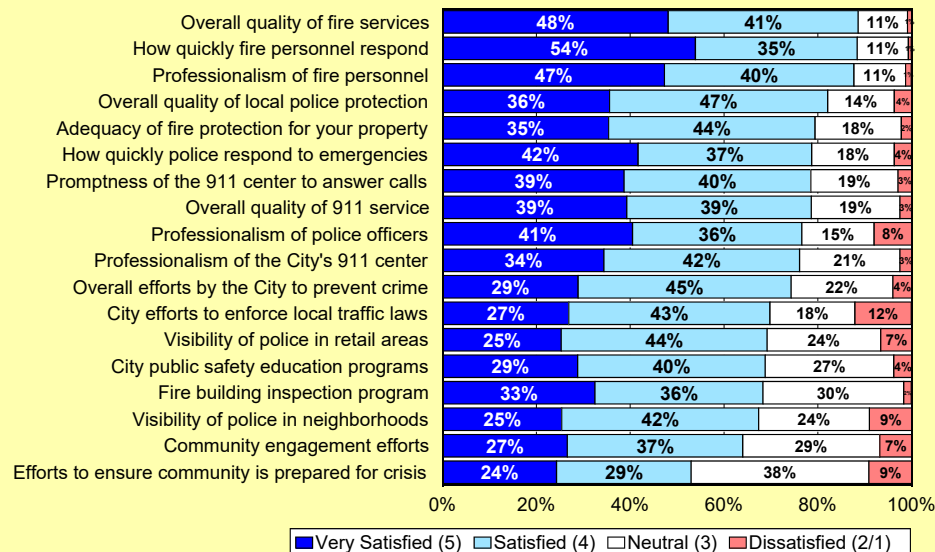
Q3. Satisfaction with Items That Influence Perceptions of the City

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



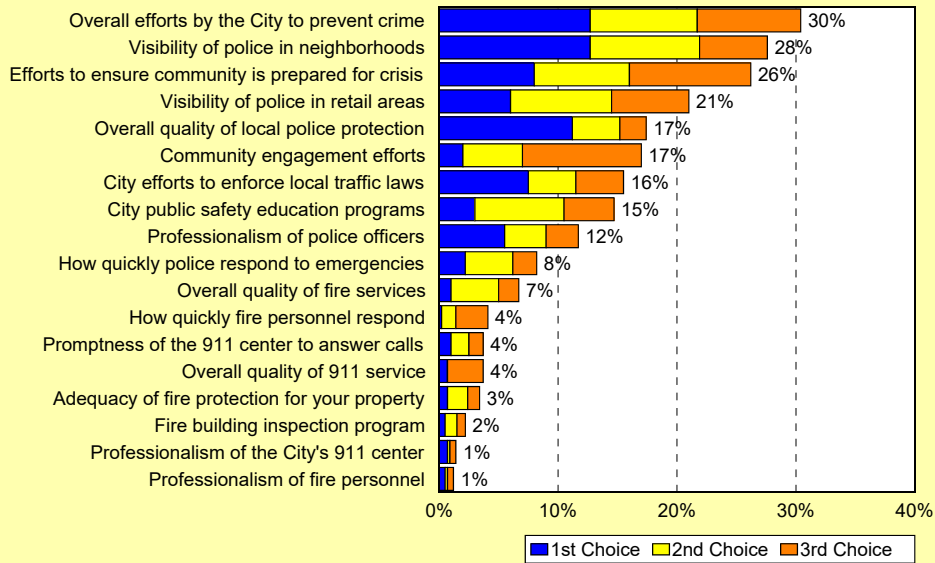
Q4. Satisfaction with Public Safety and Emergency Services

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



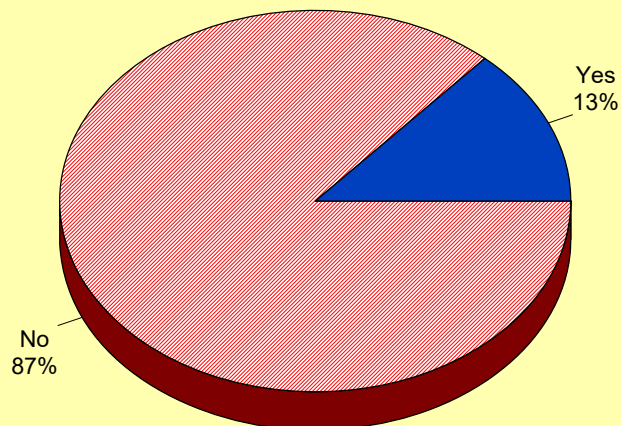
Q5. Public Safety and Emergency Services That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top three choices



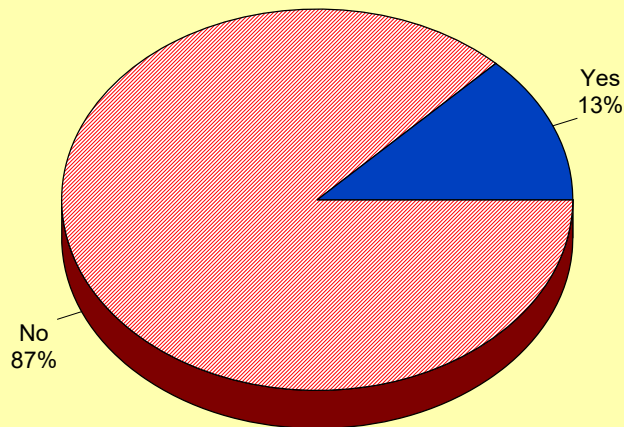
Q6. Have you ever participated in or attended any public safety related meetings or events?

by percentage of respondents



Q7. Do you follow the Concord Police Department on Twitter or our Facebook page?

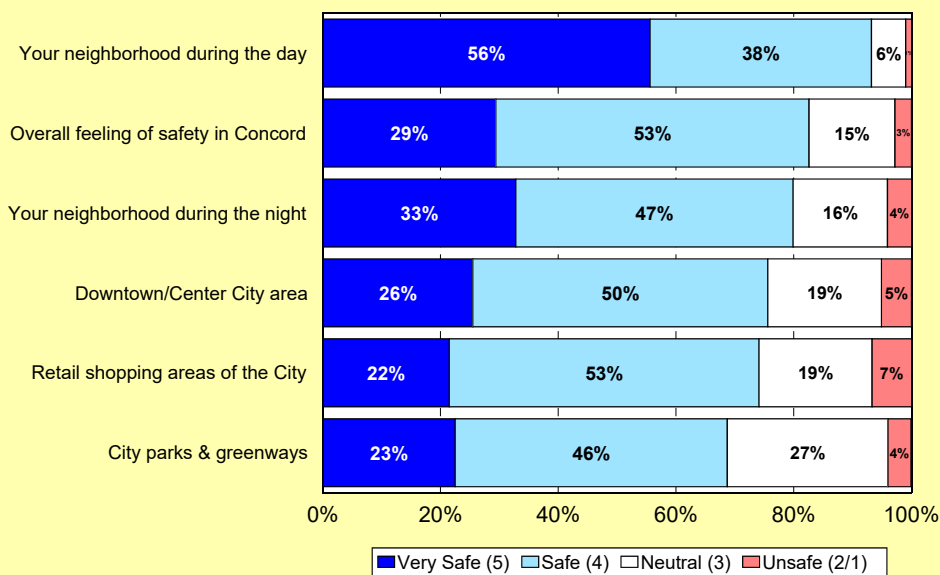
by percentage of respondents



Source: ETC Institute (2017)

Q8. Feeling of Safety in Various Situations

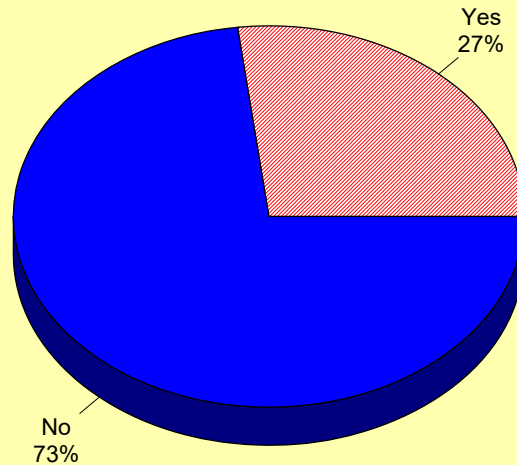
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q9. Are there any areas of town where you feel unsafe?

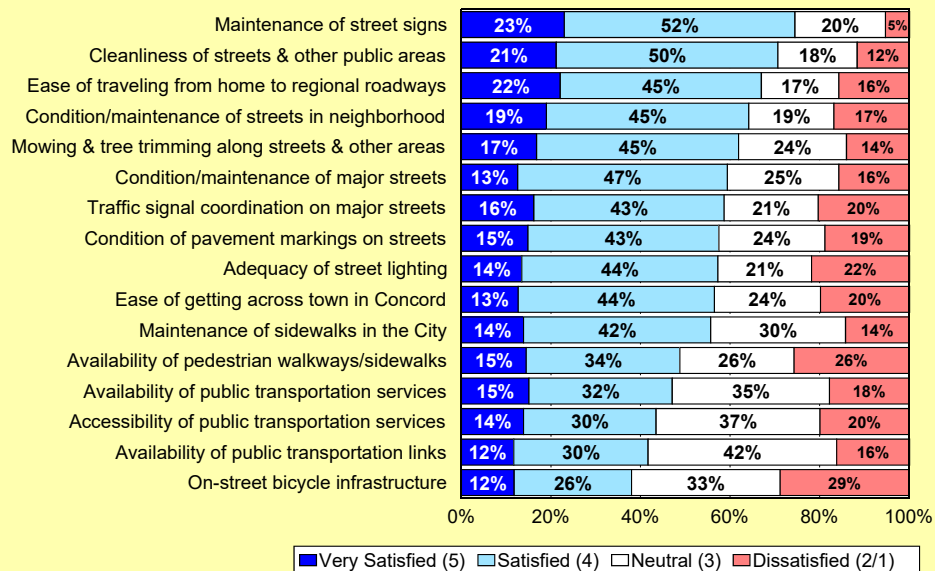
by percentage of respondents



Source: ETC Institute (2017)

Q10. Satisfaction with Transportation and Roadway Services

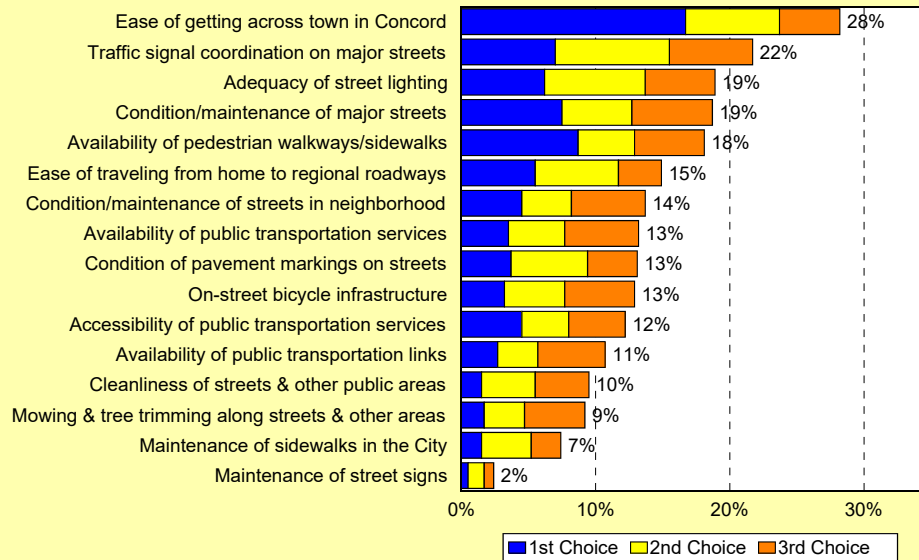
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q11. Transportation & Roadway Services That Should Receive the Most Emphasis Over the Next Two Years

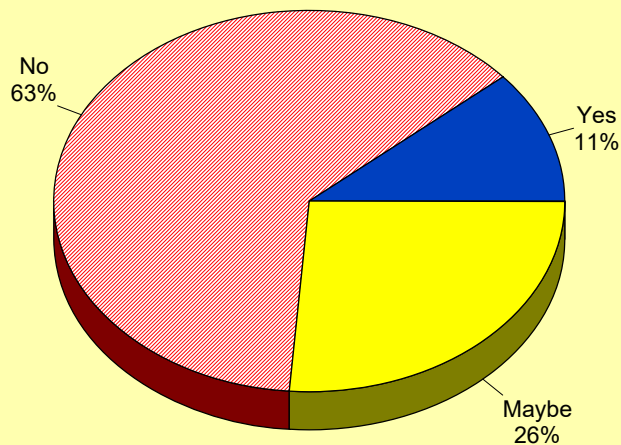
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2017)

Q12. Would you use a bicycle share program, which allows people to rent bicycles through an app on their phones?

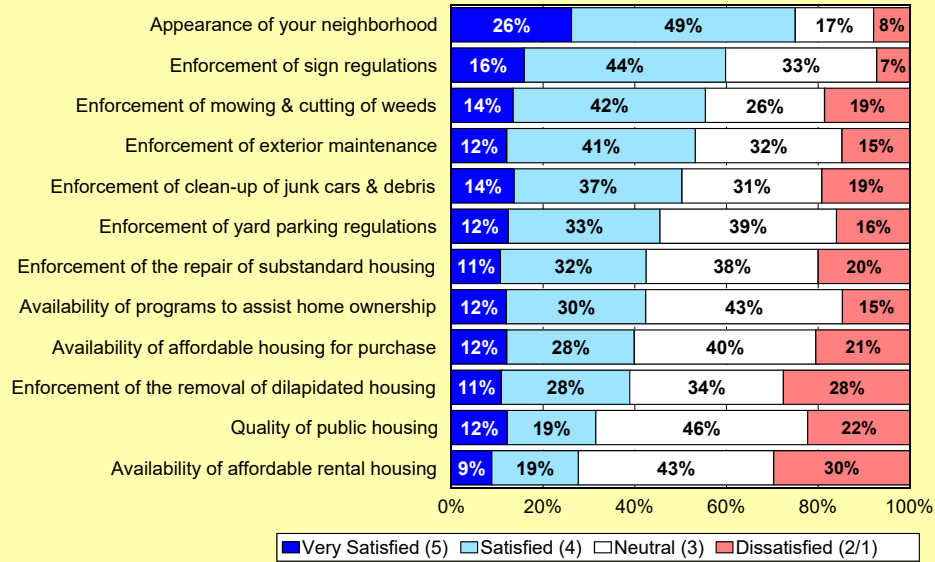
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q13. Satisfaction with Neighborhood Services

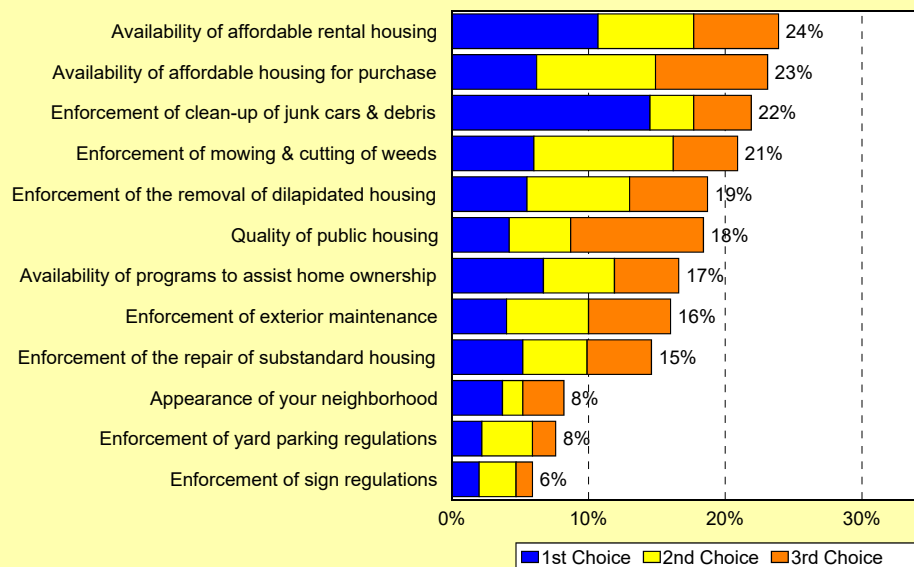
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q14. Neighborhood Services That Should Receive the Most Emphasis Over the Next Two Years

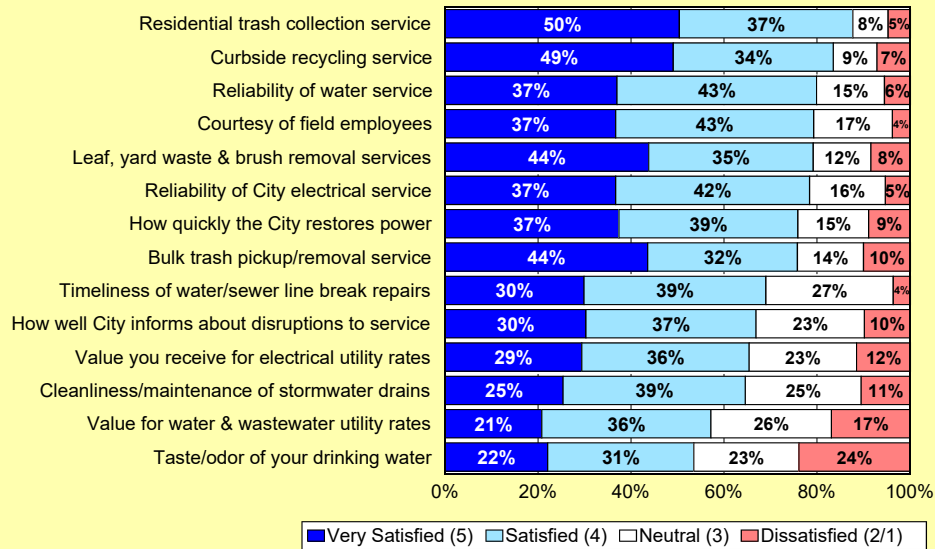
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2017)

Q15. Satisfaction with Environmental and Utility Services

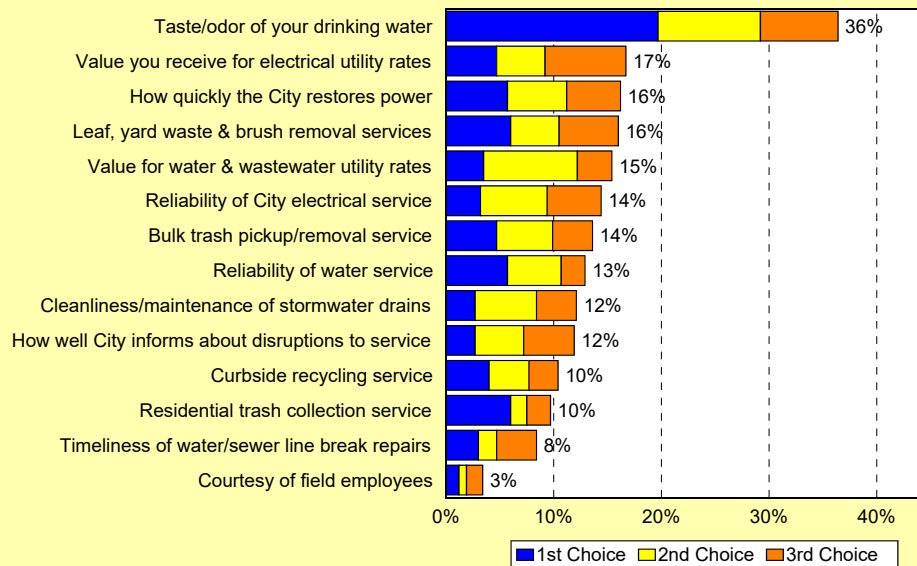
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q16. Environmental and Utility Services That Should Receive the Most Emphasis Over the Next Two Years

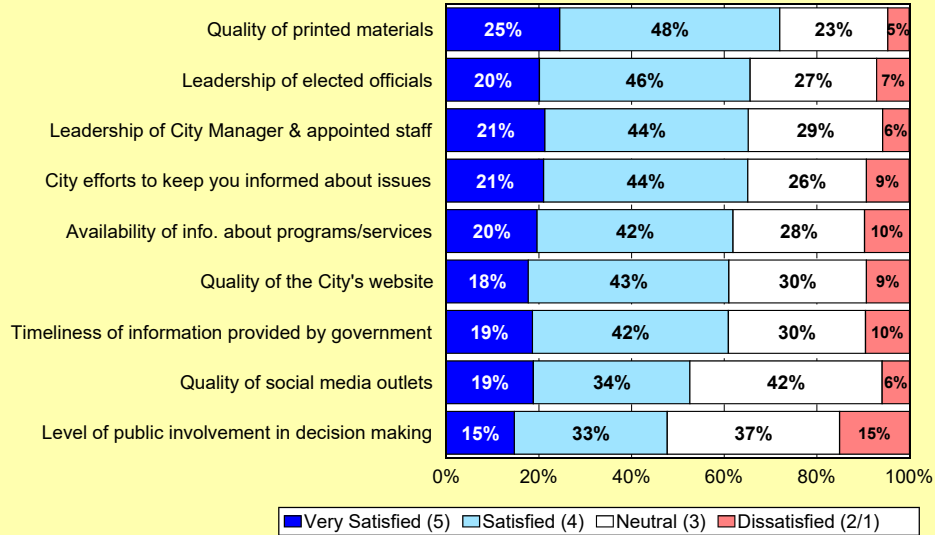
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2017)

Q17. Satisfaction with City Leadership and Communication

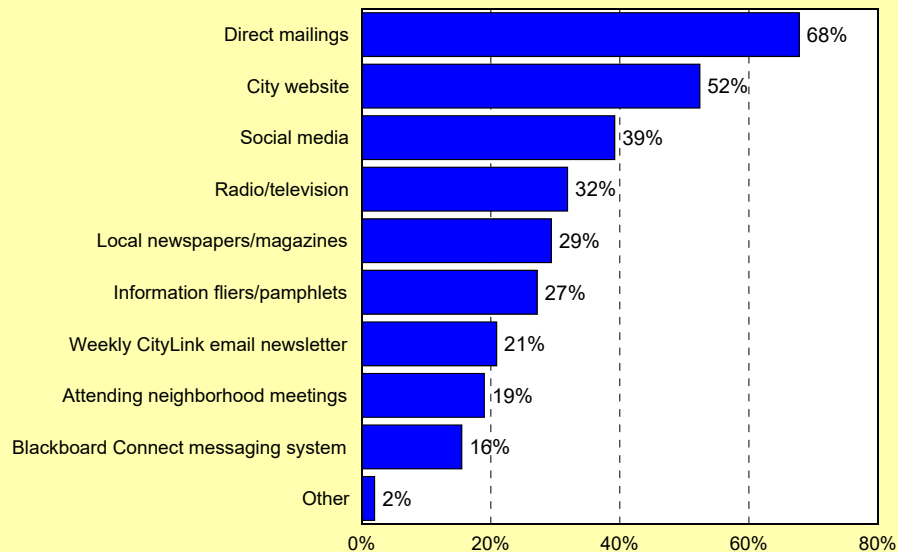
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q18. Good Ways to Get Information About City Projects or Issues

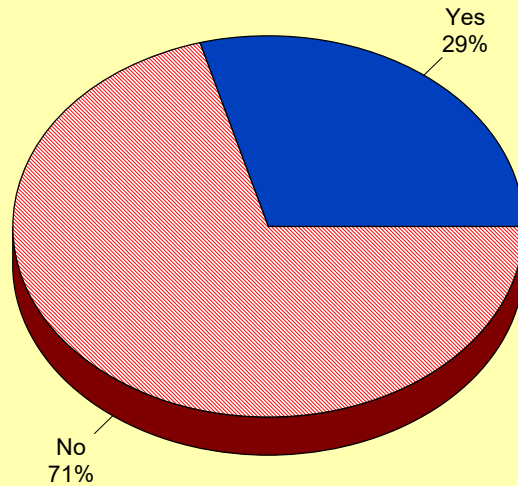
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2017)

Q19. Do you receive the CityLink newsletter?

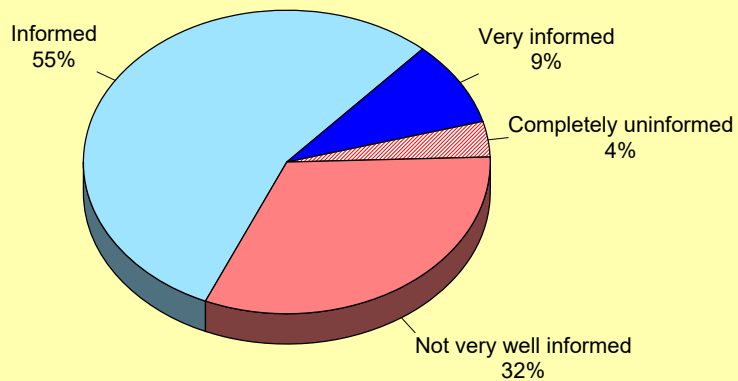
by percentage of respondents



Source: ETC Institute (2017)

Q20. Overall, how informed do you feel you are about the City of Concord and its services?

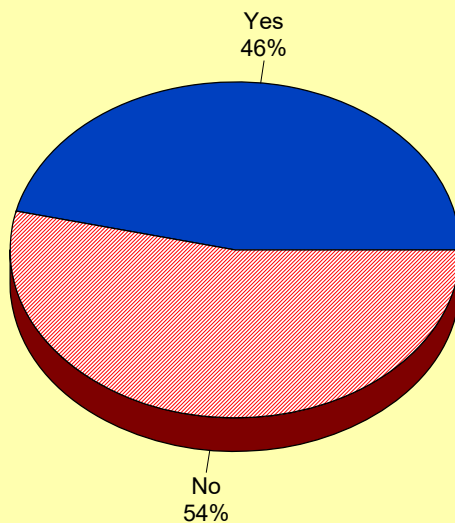
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q21. Have you called the City's Customer Care Center within the past year?

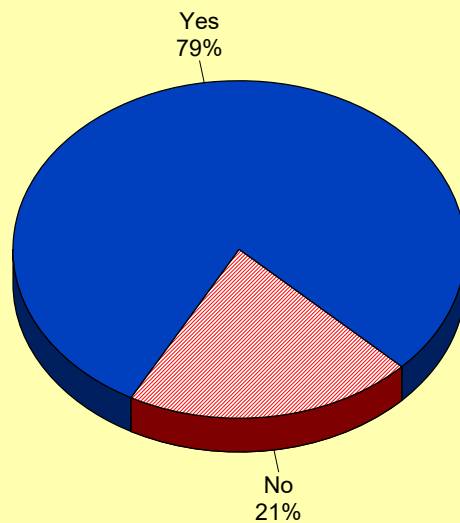
by percentage of respondents



Source: ETC Institute (2017)

Q21a. The LAST time you called, was your concern resolved the first time?

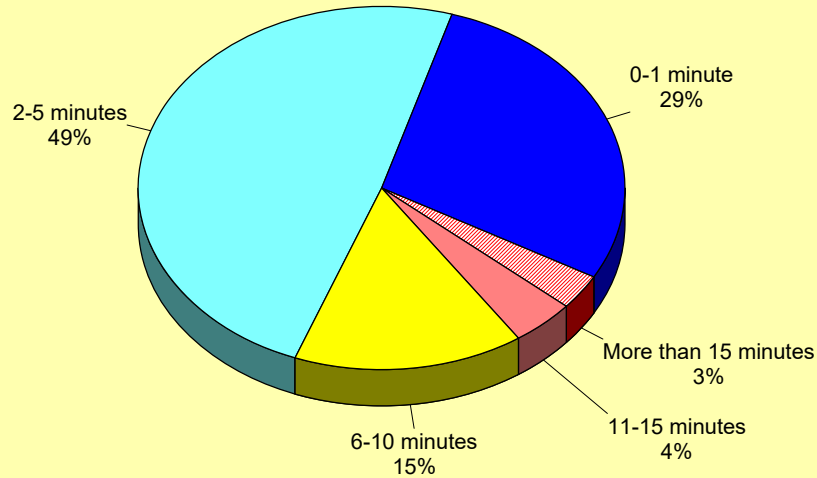
by percentage of respondents who have called the Customer Care Center within the past year
(excluding don't remember)



Source: ETC Institute (2017)

Q21b. The LAST time you called, how long did you wait before speaking with a representative?

by percentage of respondents who have called the Customer Care Center within the past year

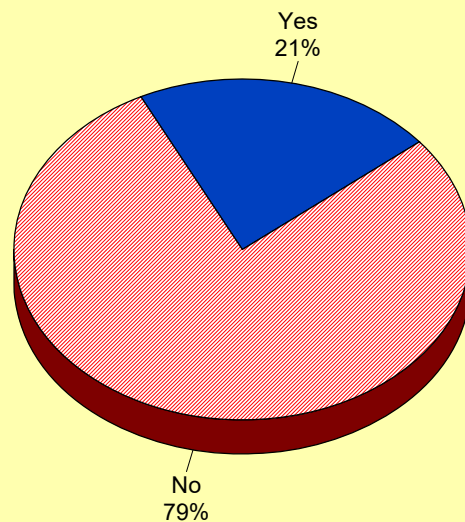


Mean = 2.05 minutes

Source: ETC Institute (2017)

Q22. Have you visited City Hall to discuss your utility account with a Customer Service Representative?

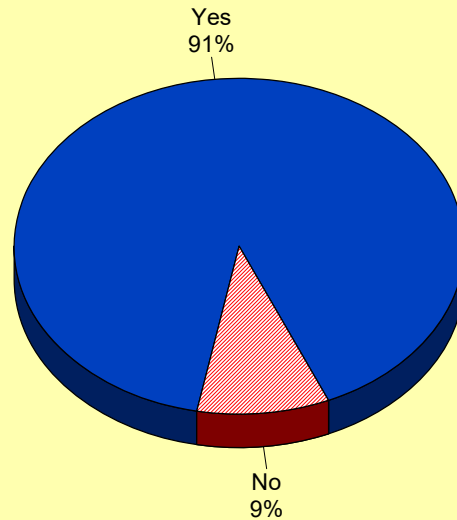
by percentage of respondents



Source: ETC Institute (2017)

Q22a. Were you assisted in a prompt and professional manner?

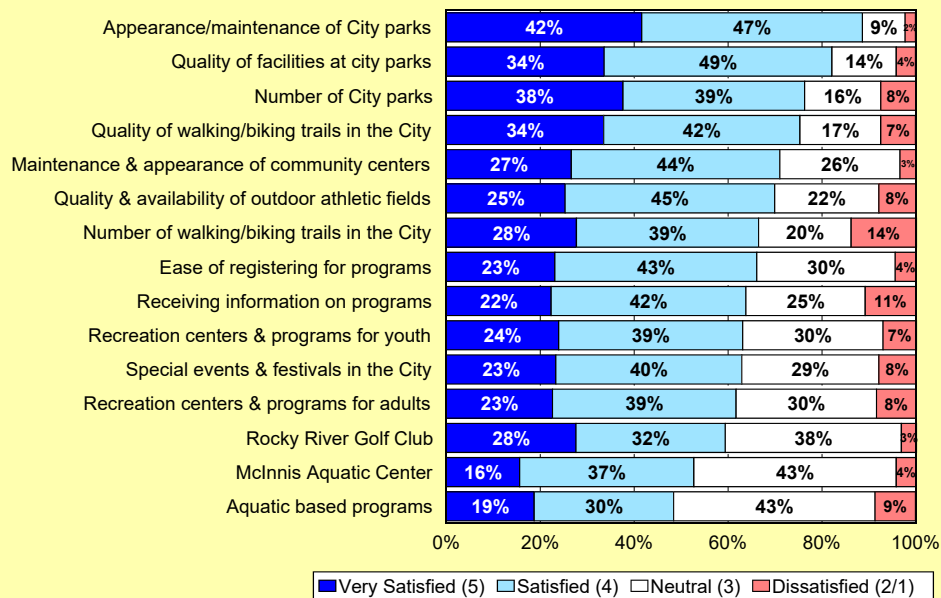
by percentage of respondents who have discussed their utility account with a Customer Service Representative



Source: ETC Institute (2017)

Q23. Satisfaction with Parks and Recreation Services

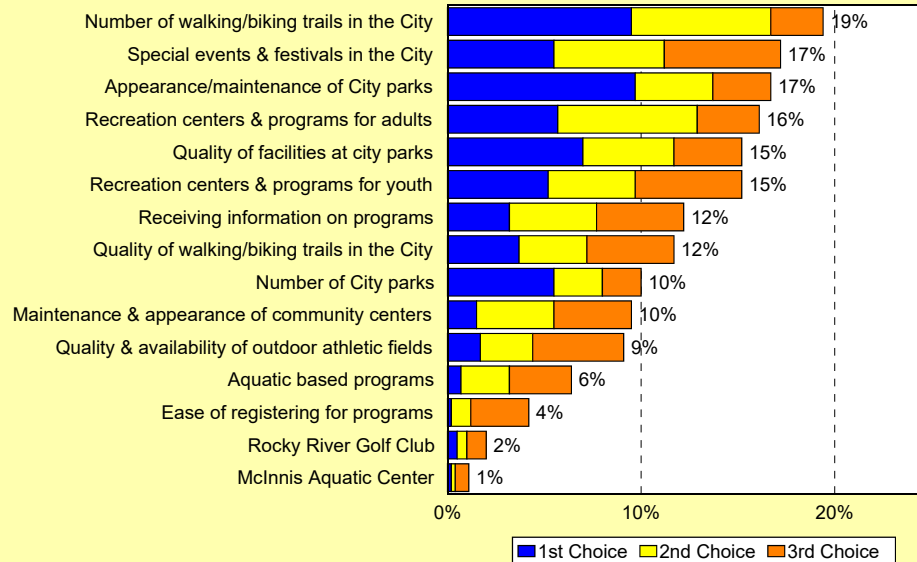
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

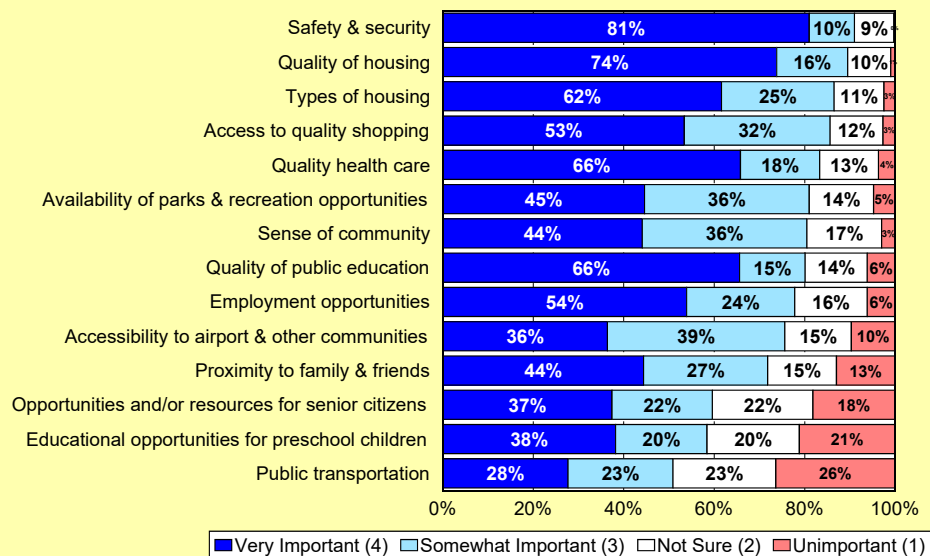
Q24. Parks and Recreation Services That Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top three choices



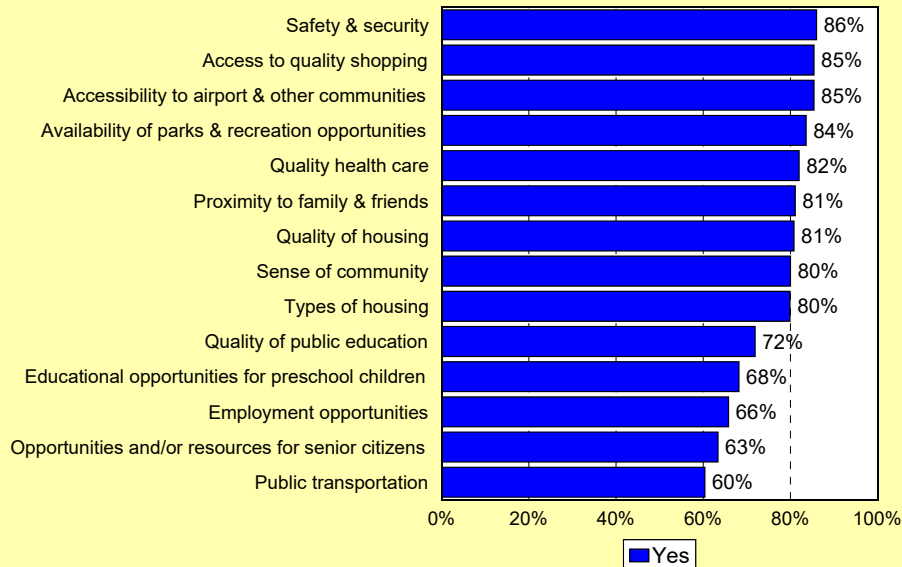
Q25. [Part 1] Importance of Various Aspects of Quality of Life

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



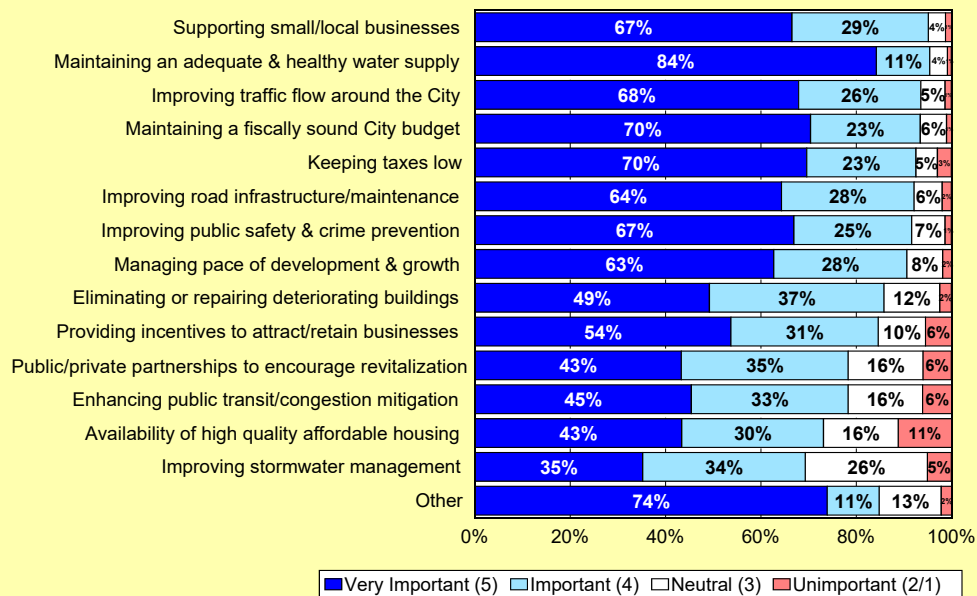
Q25. [Part 2] Are the following needs being met in Concord?

by percentage of respondents who answered "yes" (excluding not provided - multiple choices could be made)



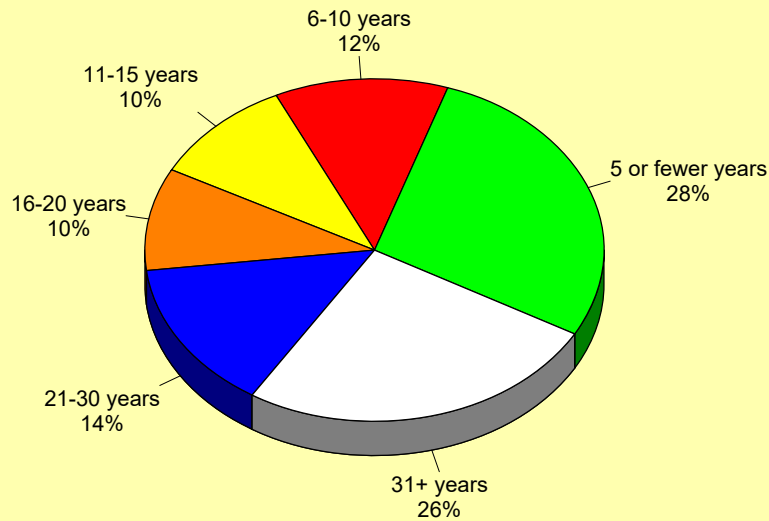
Q26. Importance of Various Issues for the Future

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Q28. Demographics: Approximately how many years have you lived in Concord?

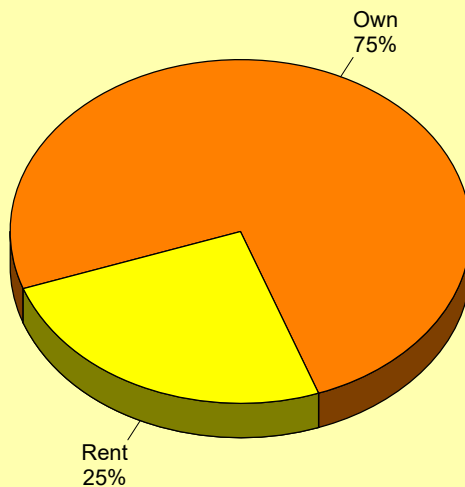
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q29. Demographics: Do you own or rent your current residence?

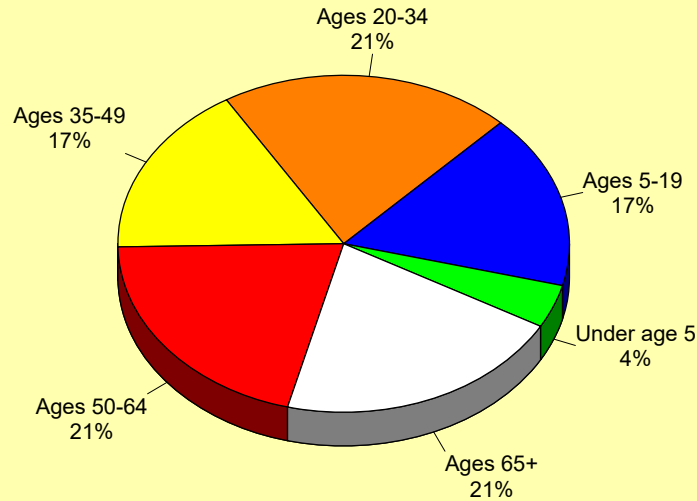
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q30. Demographics: How many persons in your household are in each of the following age groups?

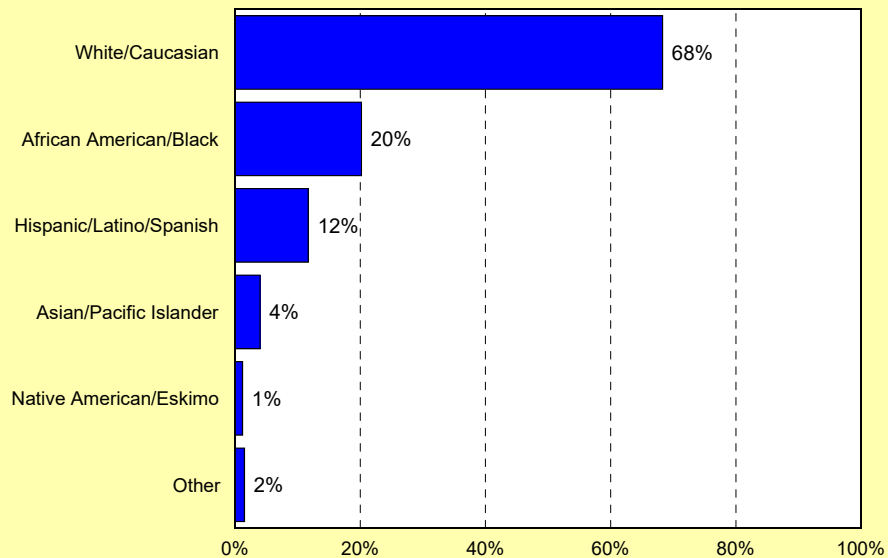
by percentage of household members



Source: ETC Institute (2017)

Q31. Demographics: Which of the following best describes your race/ethnicity?

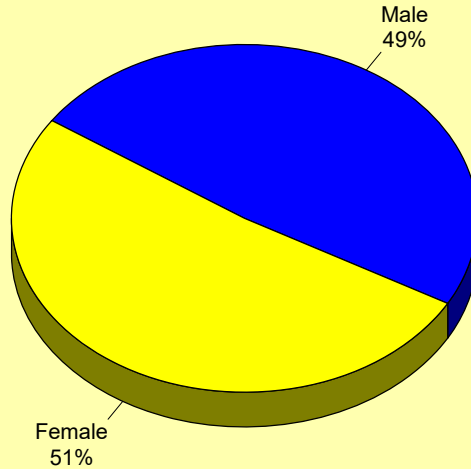
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2017)

Q32. Demographics: What is your gender?

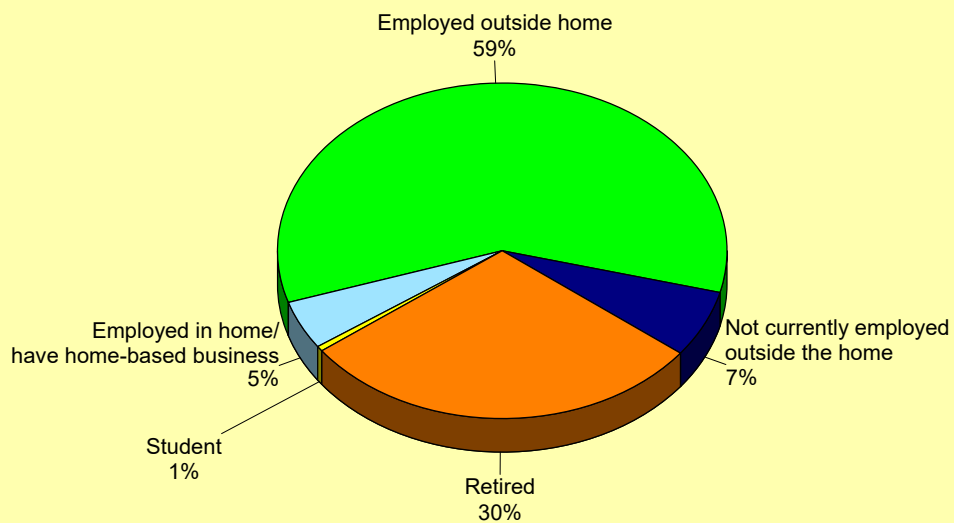
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q33. Demographics: Which best describes your current employment status?

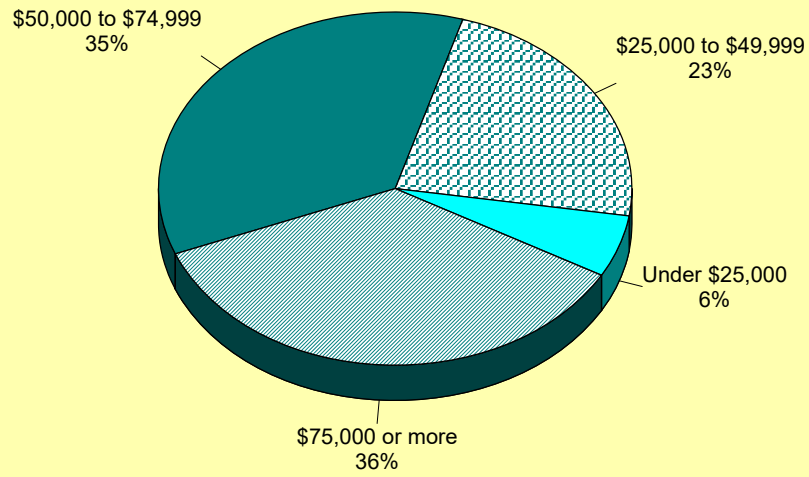
by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Q34. Demographics: Annual Household Income

by percentage of respondents (excluding not provided)



Source: ETC Institute (2017)

Section 2: **Benchmarking Data**

Benchmarking Summary Report

Concord, North Carolina

Overview

ETC Institute's DirectionFinder® program was originally developed in 1999 to help community leaders across the United States use statistically valid community survey data as a tool for making better decisions. Since November 1999, the survey has been administered in more than 300 cities and counties in 43 states.

This report contains benchmarking data from two sources. The first source is from a national survey that was administered by ETC Institute during the summer of 2016 to a random sample of over 4,000 residents in the continental United States. The second source is from a regional survey administered to a random sample of more than 300 residents in the Atlantic Region of the United States during the summer of 2016. The states that make up the Atlantic Region are North Carolina, Virginia, West Virginia, Delaware, Maryland, District of Columbia, and New Jersey.

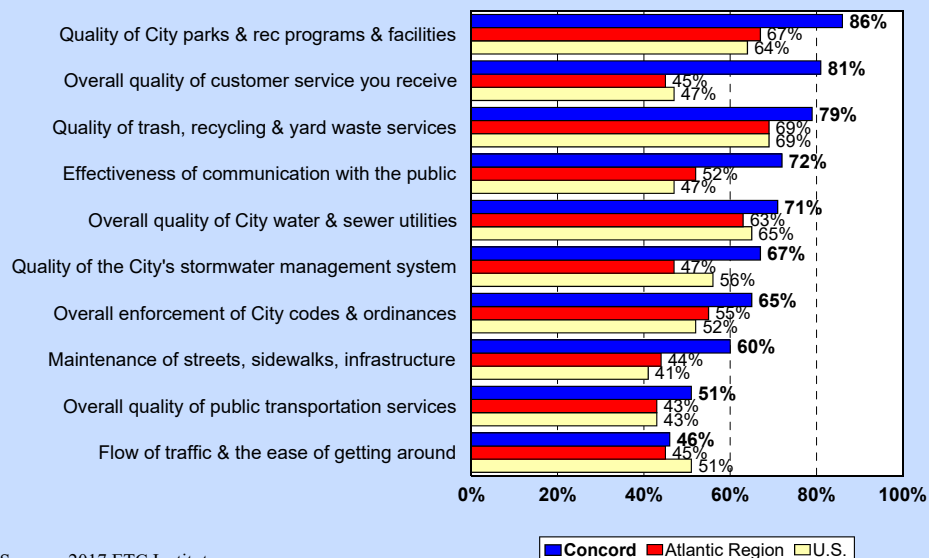
The “U.S. Average” shown in the charts reflects the overall results of ETC Institute’s national survey of more than 4,000 residents; the “Atlantic Region Average” shown in the charts reflects the results of the regional survey of more than 300 residents in the Atlantic Region.

National Benchmarks

Note: The benchmarking data contained in this report is protected intellectual property. Any reproduction of the benchmarking information in this report by persons or organizations not directly affiliated with the City of Concord, North Carolina is not authorized without written consent from ETC Institute.

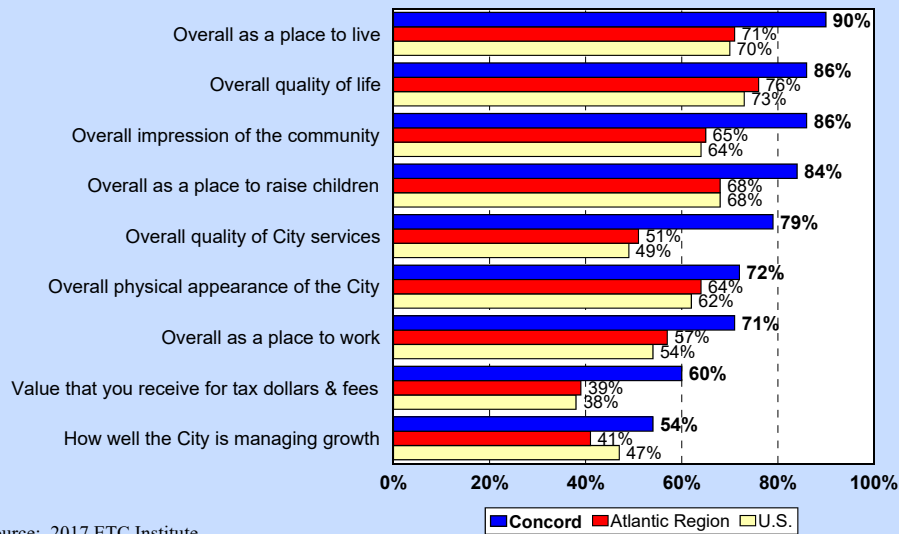
Satisfaction with Major Categories of Service Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



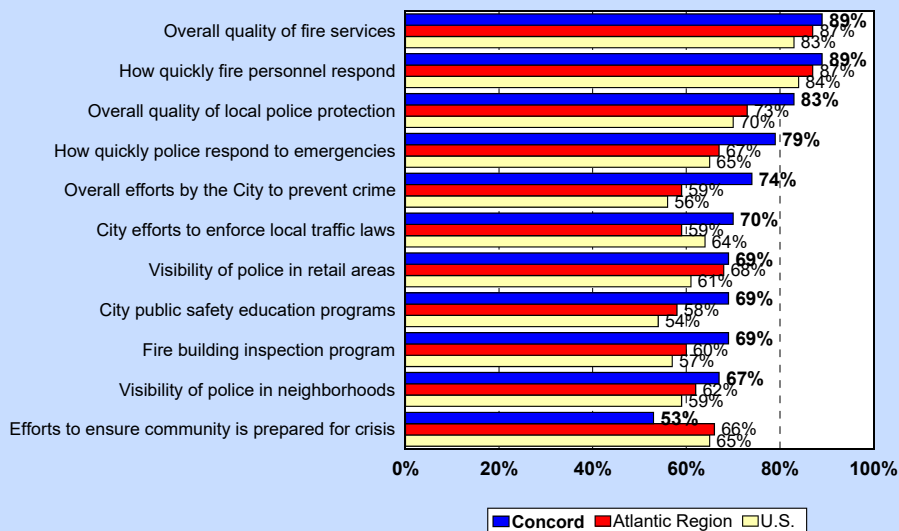
Satisfaction with Issues that Influence Perceptions of the Community Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "excellent" and 1 was "poor" (excluding don't knows)



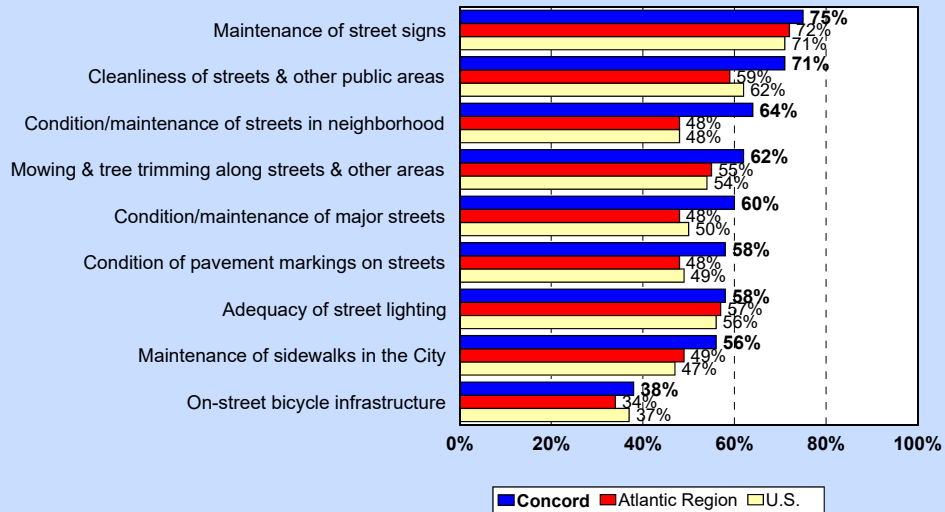
Satisfaction with Public Safety and Emergency Services Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Satisfaction with Transportation and Roadway Services Concord vs. Atlantic Region vs. the U.S.

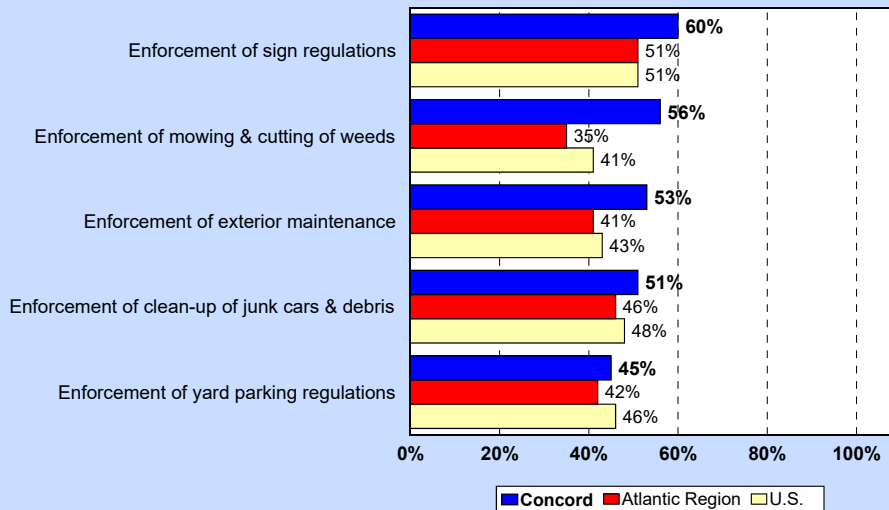
by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

Satisfaction with Neighborhood Services Concord vs. Atlantic Region vs. the U.S.

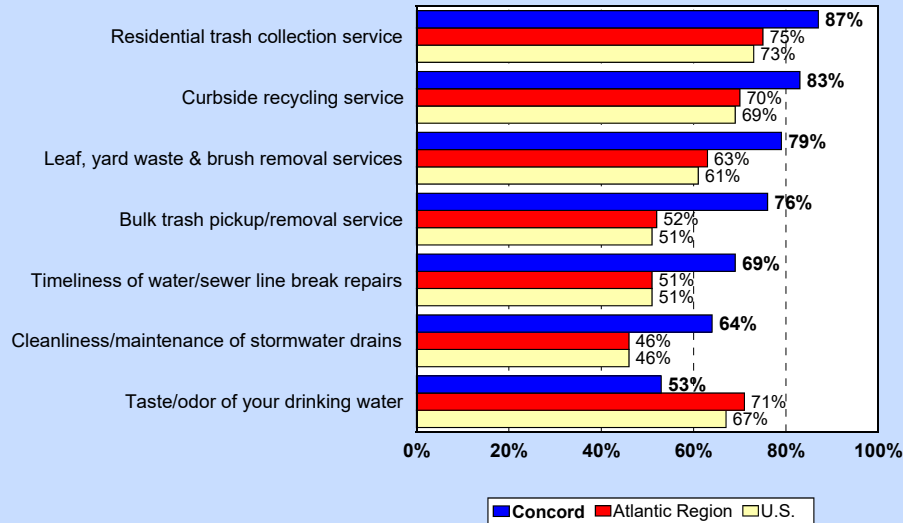
by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

Satisfaction with Environmental and Utility Services Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

Satisfaction with City Leadership and Communication Concord vs. Atlantic Region vs. the U.S.

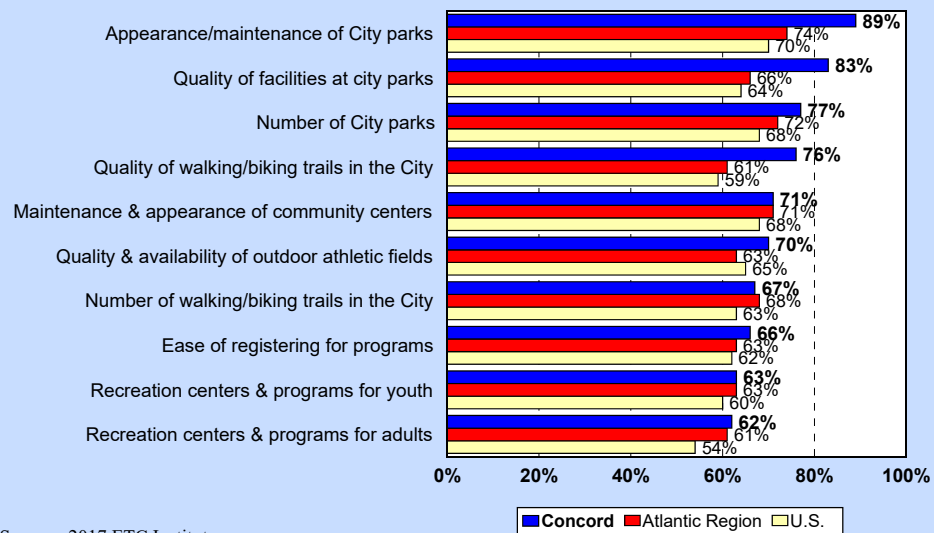
by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

Satisfaction with Parks and Recreation Services Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



2017 Citizen Satisfaction Survey

City of Concord, North Carolina

Presented by

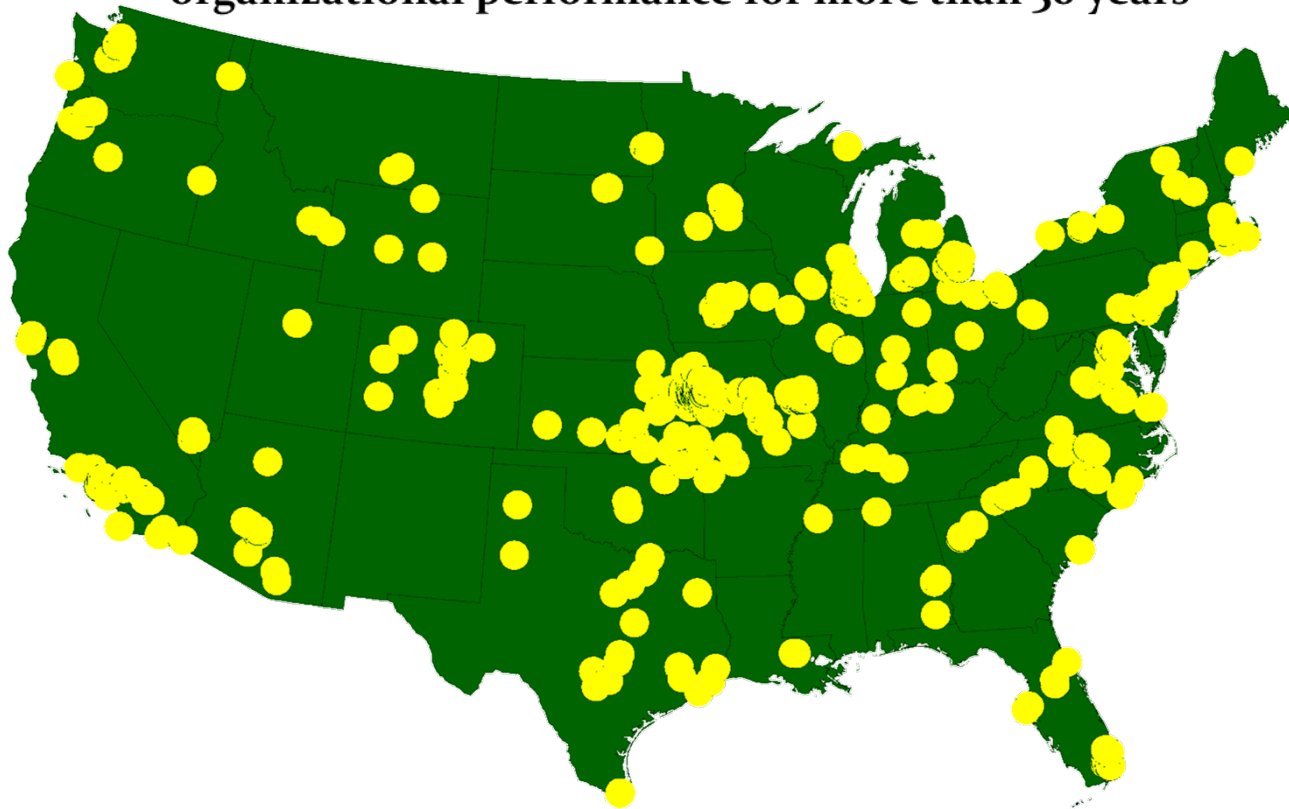


January 2018

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

...helping city and county governments gather and use survey data to enhance
organizational performance for more than 30 years



More than 2,150,000 Persons Surveyed Since 2007
for more than 900 cities in 49 States

Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**

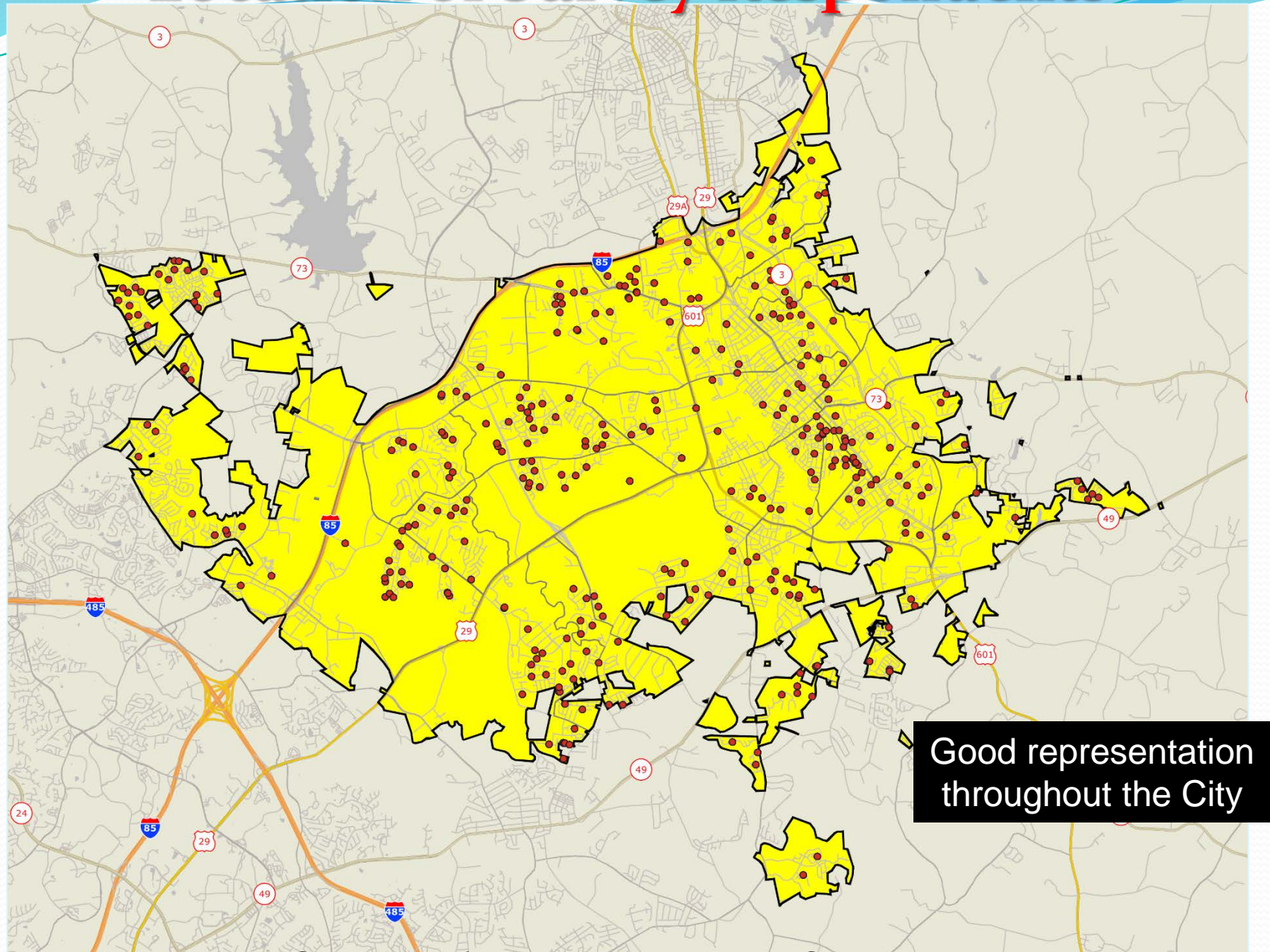
Purpose

- **To objectively assess resident satisfaction with the delivery of City services**
- **To help determine priorities for the community**
- **To set a baseline for future surveys**
- **To compare Concord's performance with other communities regionally and nationally**

Methodology

- **Survey Description**
 - ❑ seven-page survey
 - ❑ each survey took approximately 15-20 minutes to complete
- **Method of Administration**
 - ❑ by mail and online to randomly selected sample of households throughout the City
- **Sample size:**
 - ❑ 401 completed surveys
 - ❑ demographics of survey respondents accurately reflects the actual population of the City
- **Confidence level:** 95%
- **Margin of error:** +/- 5.0% overall

Location of Survey Respondents



City of Concord 2017 Citizen Satisfaction Survey

Bottom Line Up Front

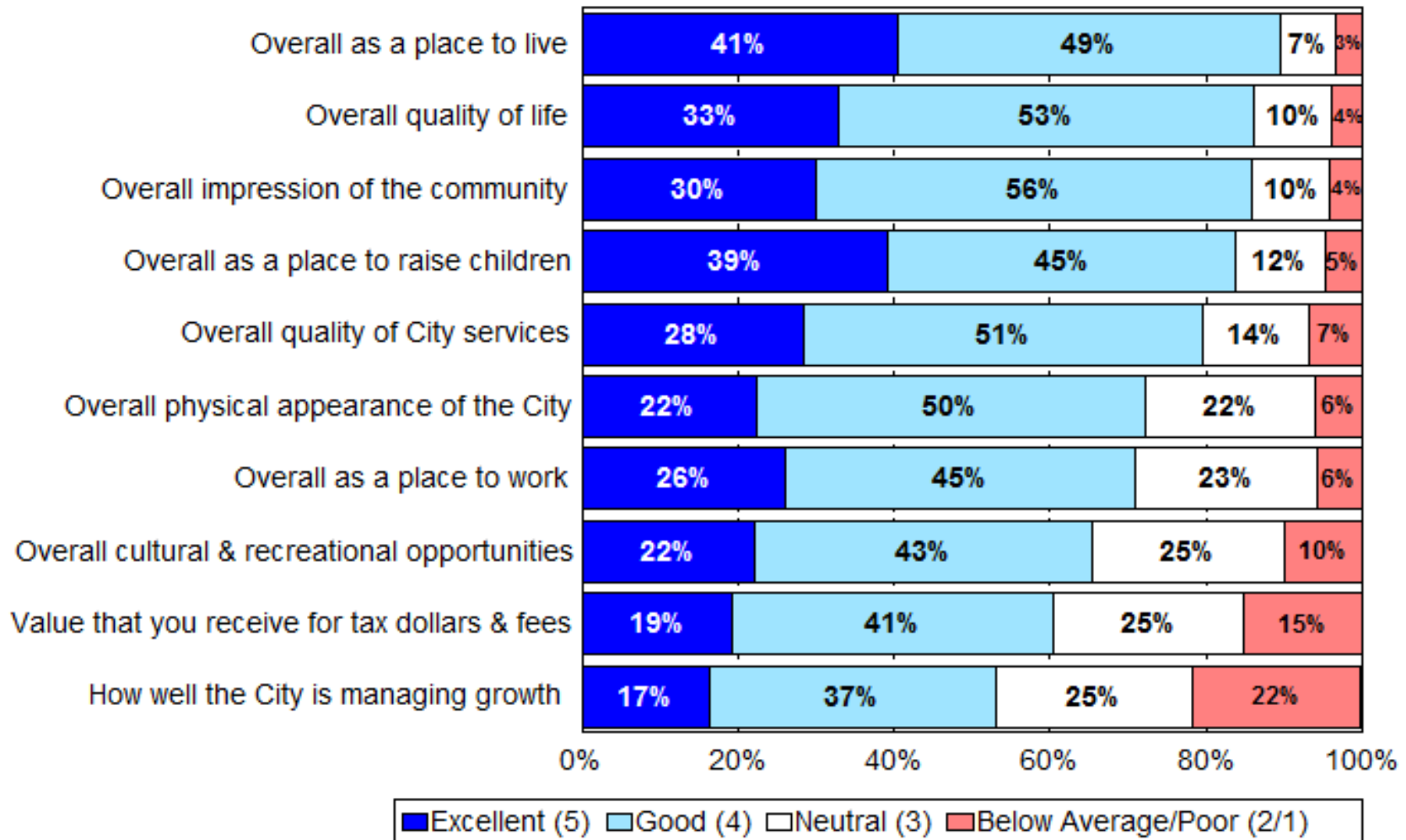
- **Residents Have a Very Positive Perception of the City**
 - ❑ 90% rated the City as an excellent or good place to live
 - ❑ 84% rated the City as an excellent or good place to raise children
- **Satisfaction with City Services Is Much Higher in Concord Than Other Communities**
 - ❑ Concord rated above the U.S. Average in 63 of the 69 areas that were compared
 - ❑ Satisfaction with the Overall Quality of City Services rated 30% above U.S. Average and 28% above Regional Average
 - ❑ Satisfaction with Value Received for Taxes and Fees rated 22% above U.S. Average and 21% above Regional Average
- **Opportunities for Improvement That Will Have the Most Positive Impact on Overall Satisfaction Over the Next Few Years:**
 - ❑ Flow of Traffic and Ease of Getting Around the City
 - ❑ Maintenance of Streets, Sidewalks, and Infrastructure
- **Most Important Issues for the Future:**
 - ❑ Supporting Small/Local Businesses
 - ❑ Maintaining an Adequate & Healthy Water Supply
 - ❑ Improving Traffic Flow Around the City

Major Finding #1

Residents Have a Very Positive
Perception of the City

Q3. Satisfaction with Items That Influence Perceptions of the City

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

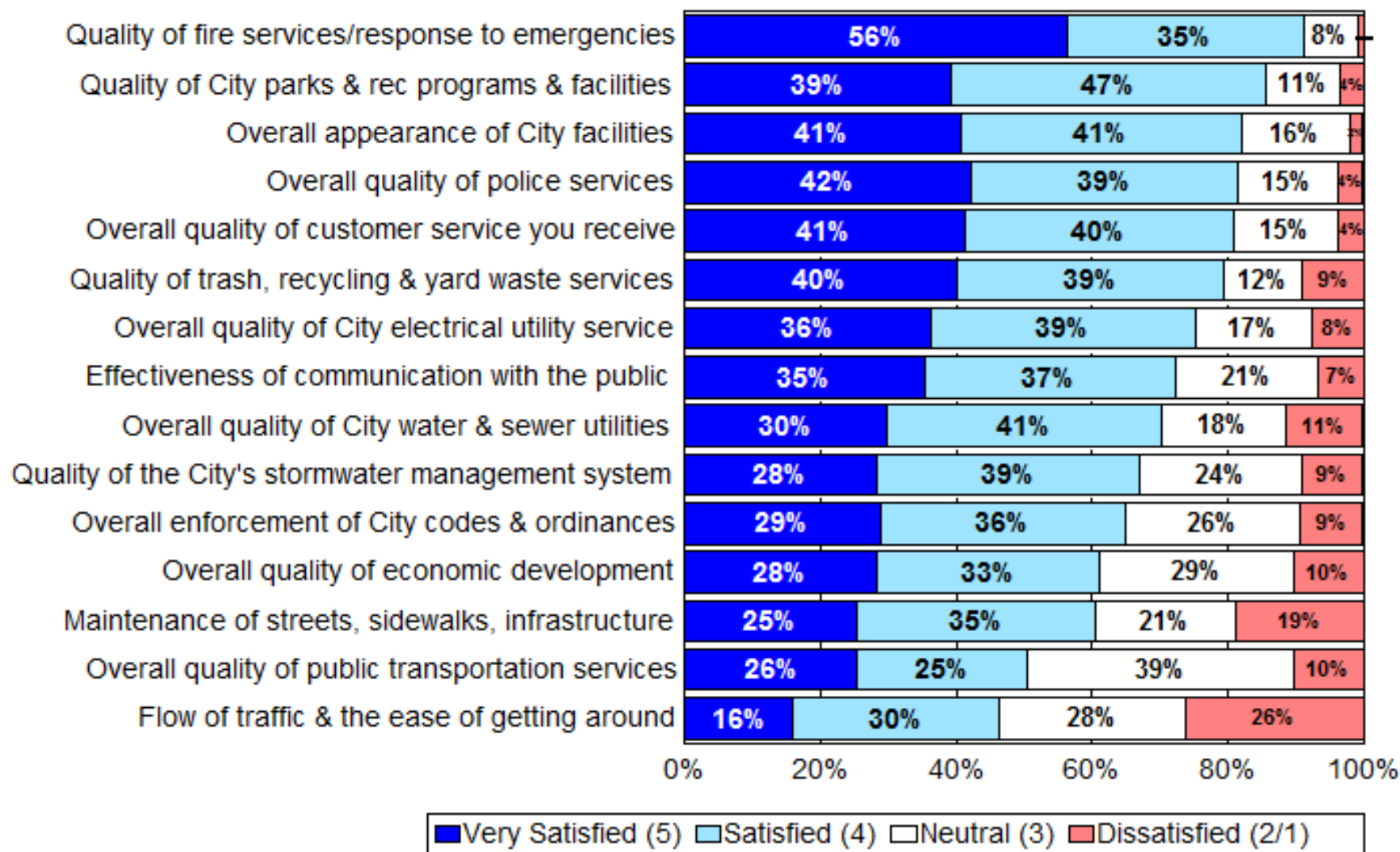


Source: ETC Institute (2017)

More Than an 11-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied with the Overall Quality of Services Provided by the City (79% vs. 7%)

Q1. Overall Satisfaction with City Services by Major Category

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

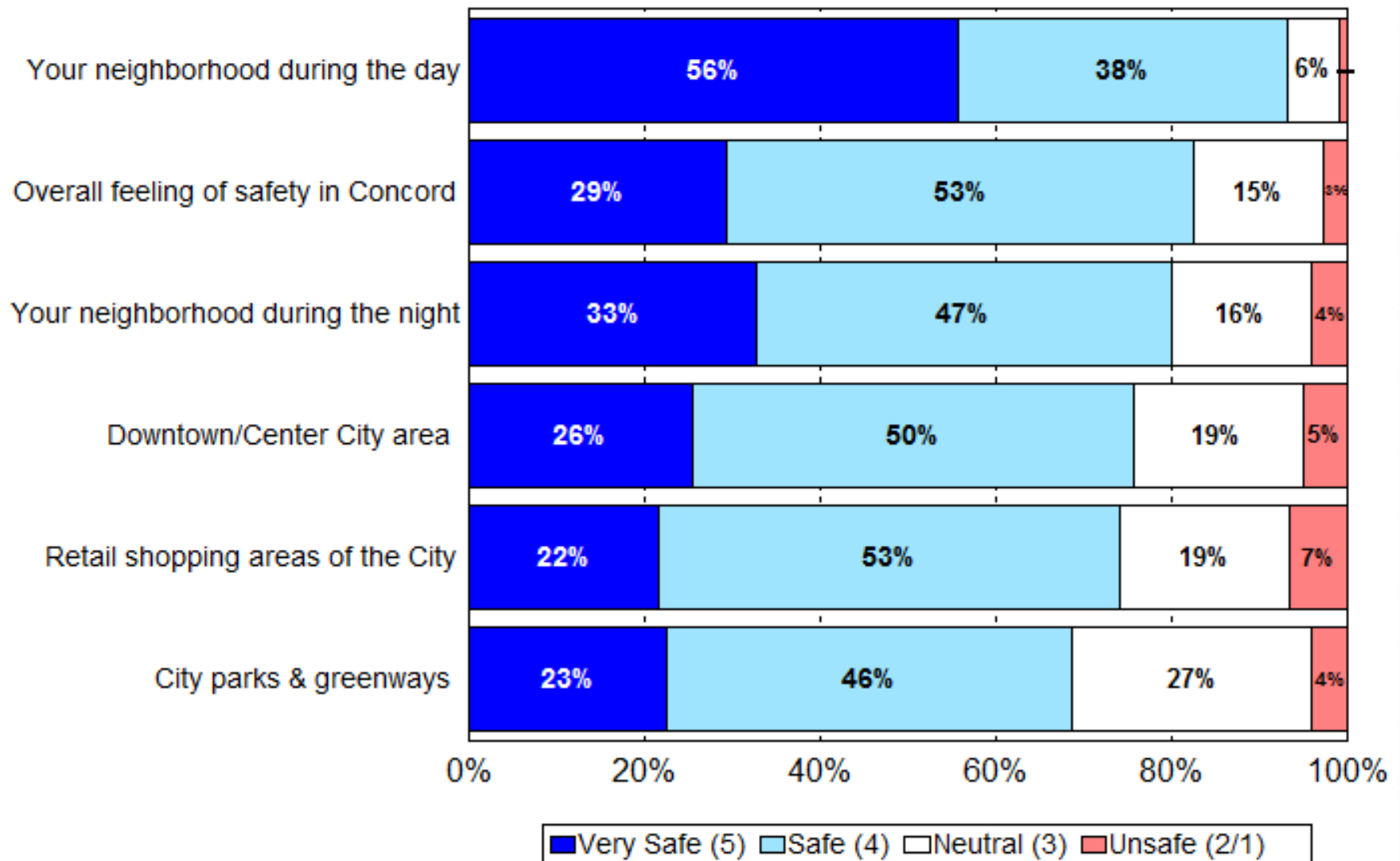


Source: ETC Institute (2017)

Most Services Received Very High Satisfaction Ratings.

Q8. Feeling of Safety in Various Situations

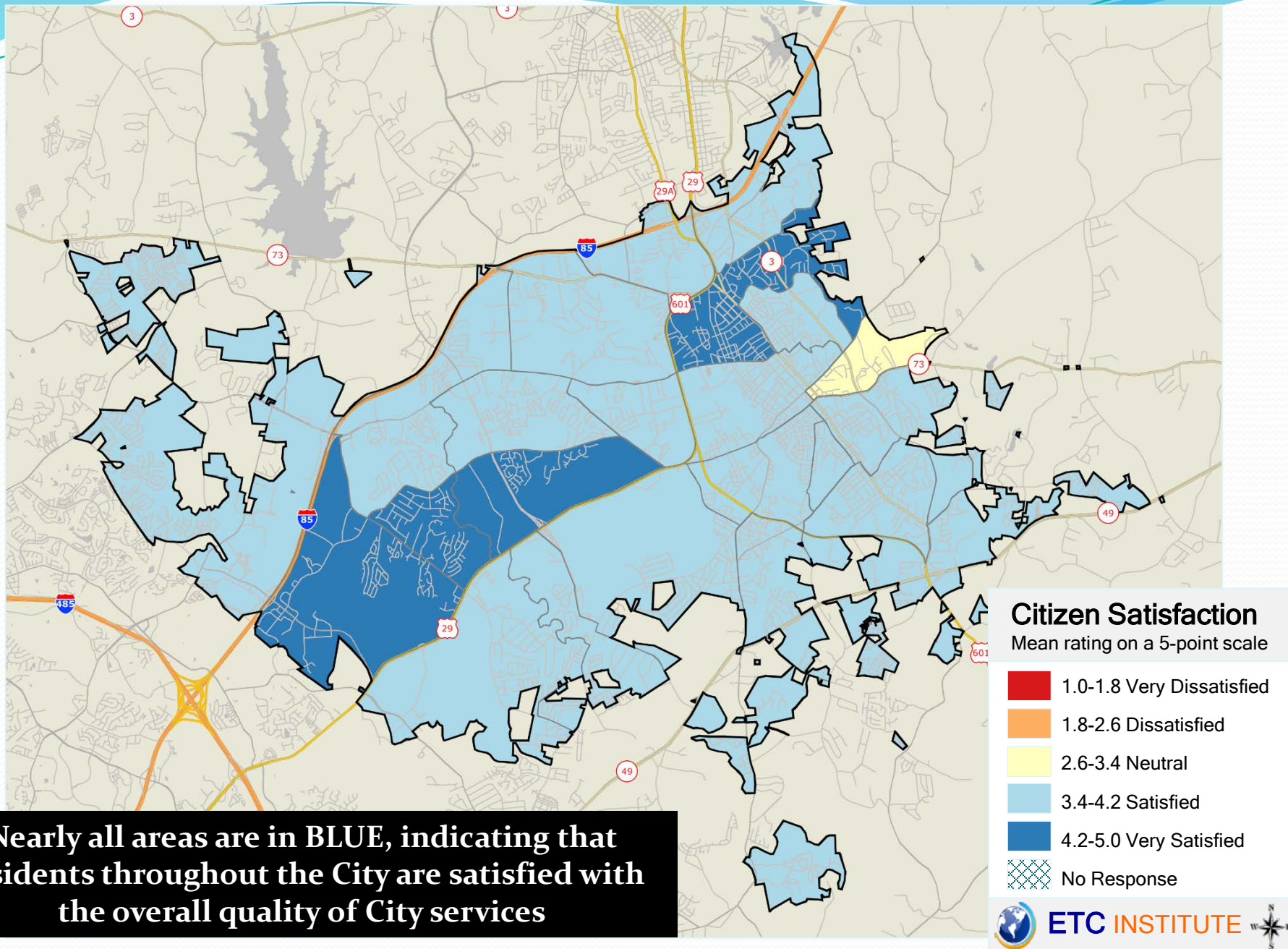
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Most Residents Feel Safe in Their Neighborhood During the Day and at Night

Overall Quality of Services Provided by the City

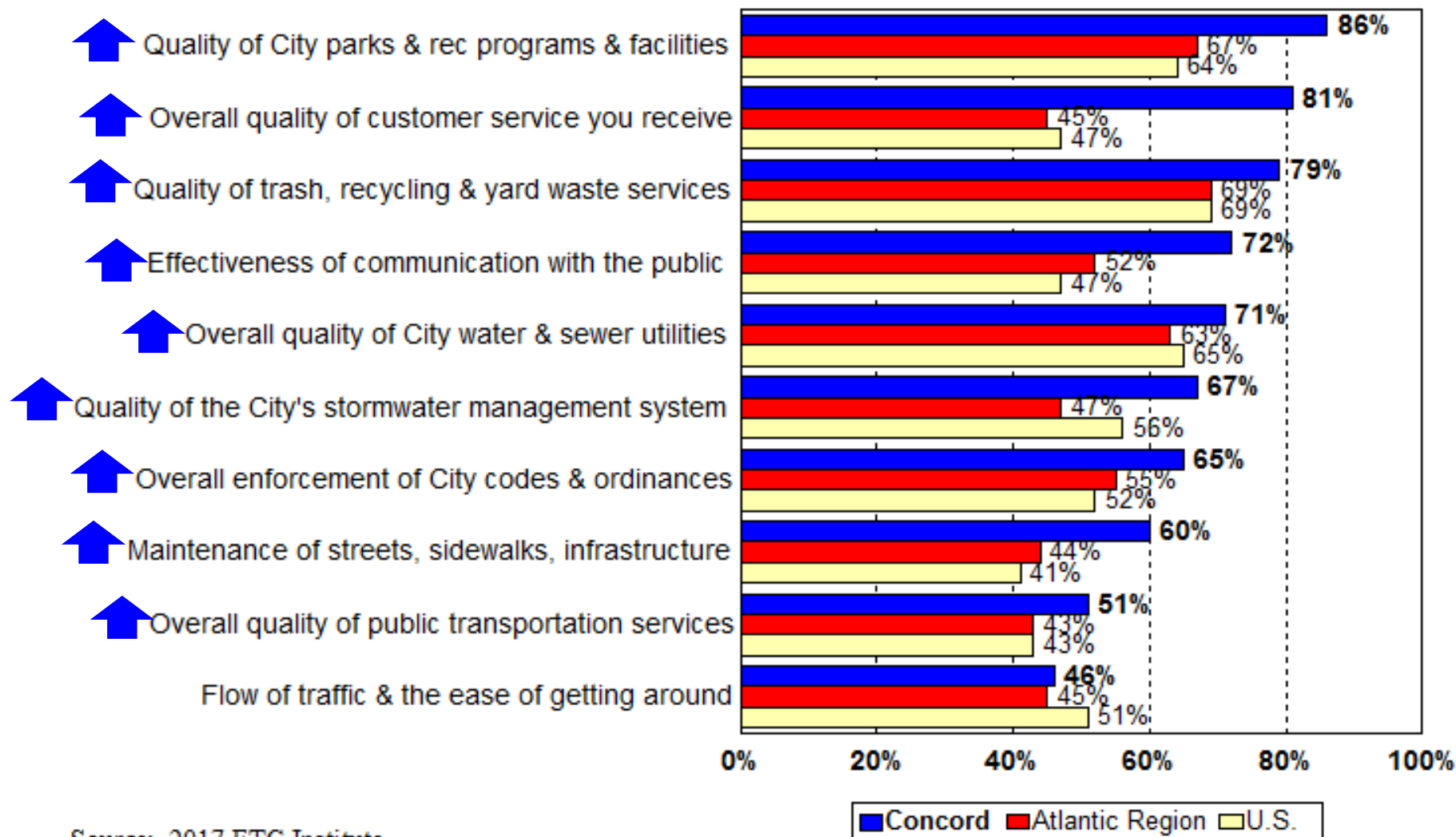


Major Finding #2

**Satisfaction with City Services Is
Much Higher in Concord Than
Other Communities**

Satisfaction with Major Categories of Service Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

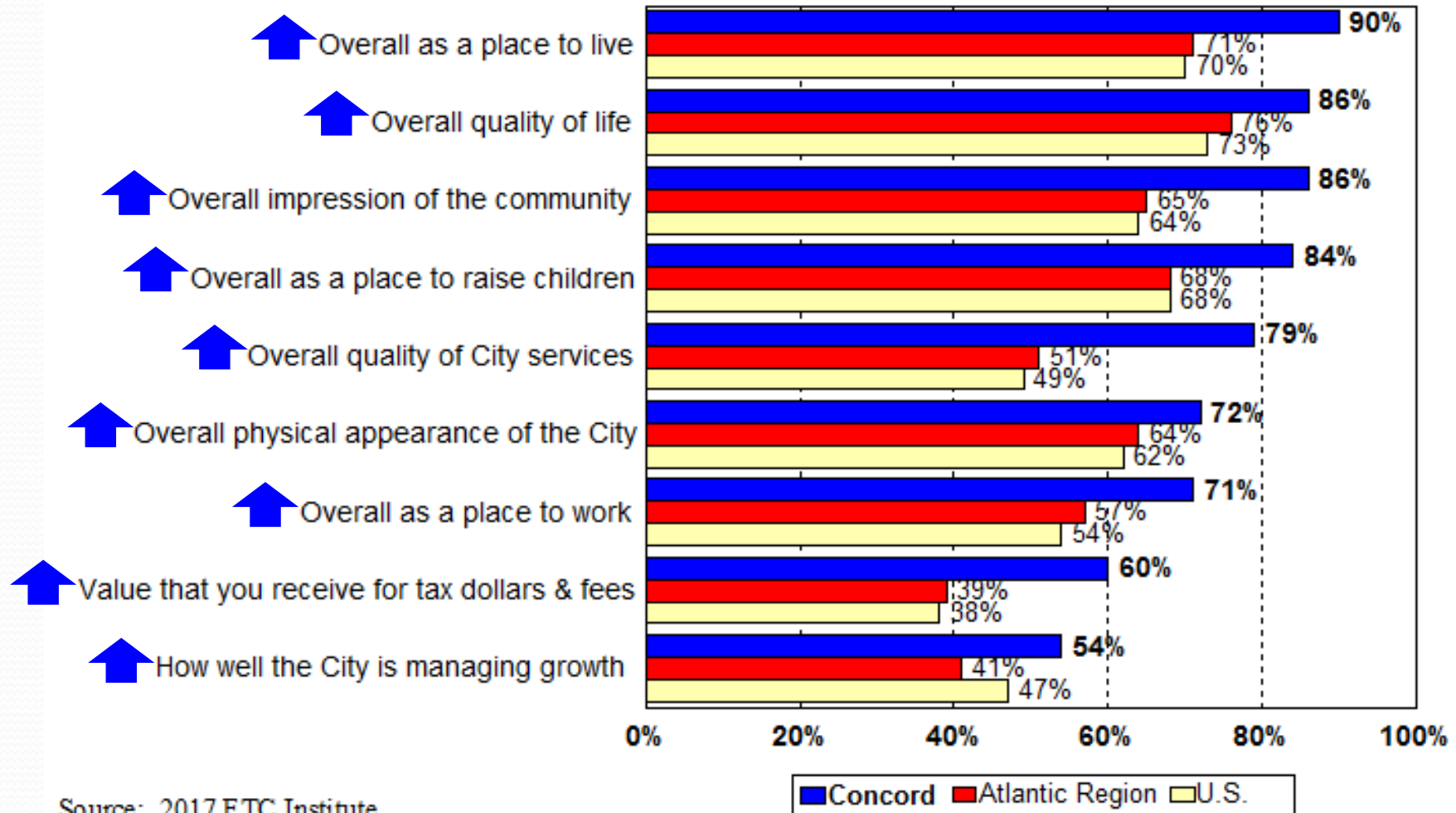
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Issues that Influence Perceptions of the Community

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "excellent" and 1 was "poor" (excluding don't knows)



Source: 2017 ETC Institute

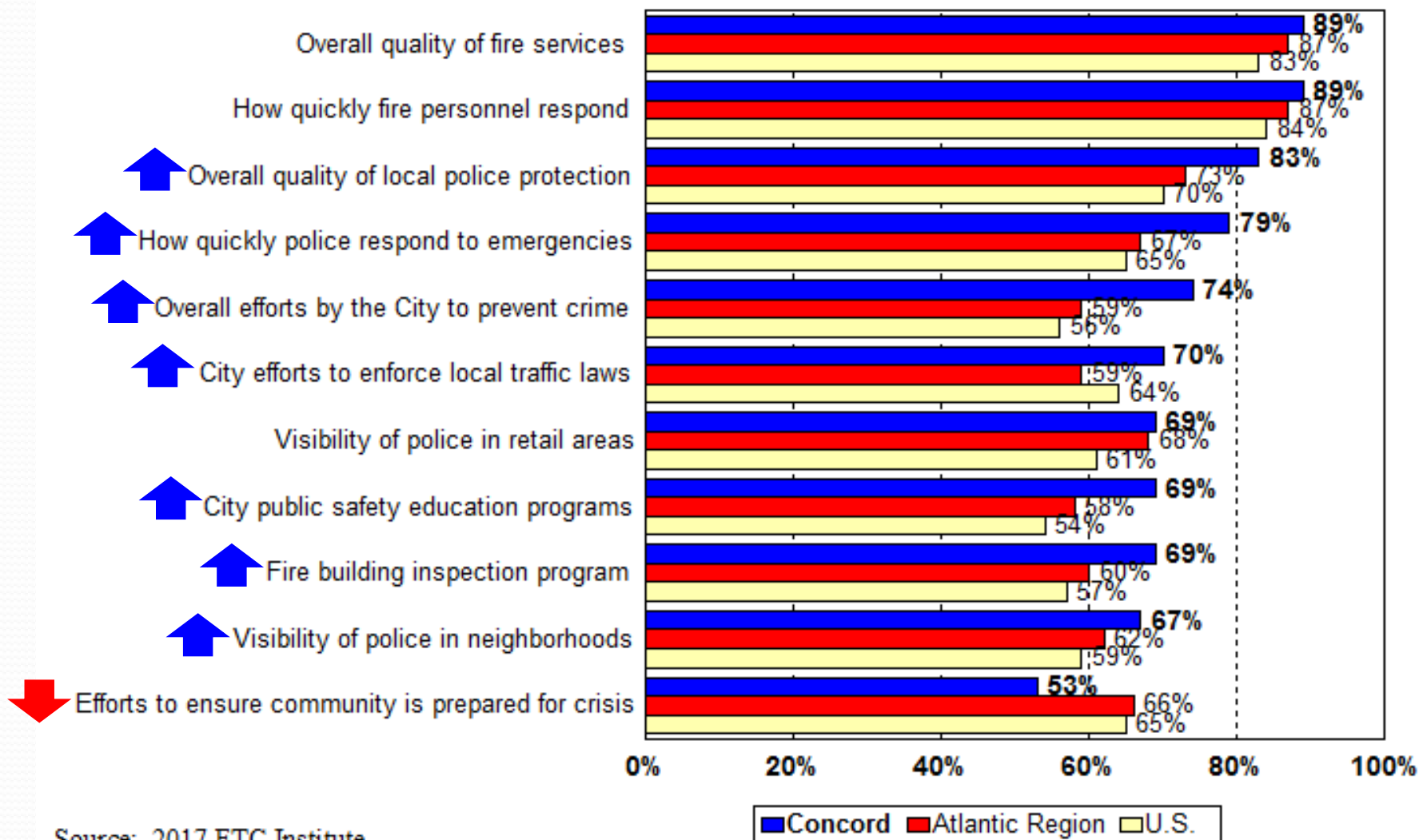
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Public Safety and Emergency Services

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



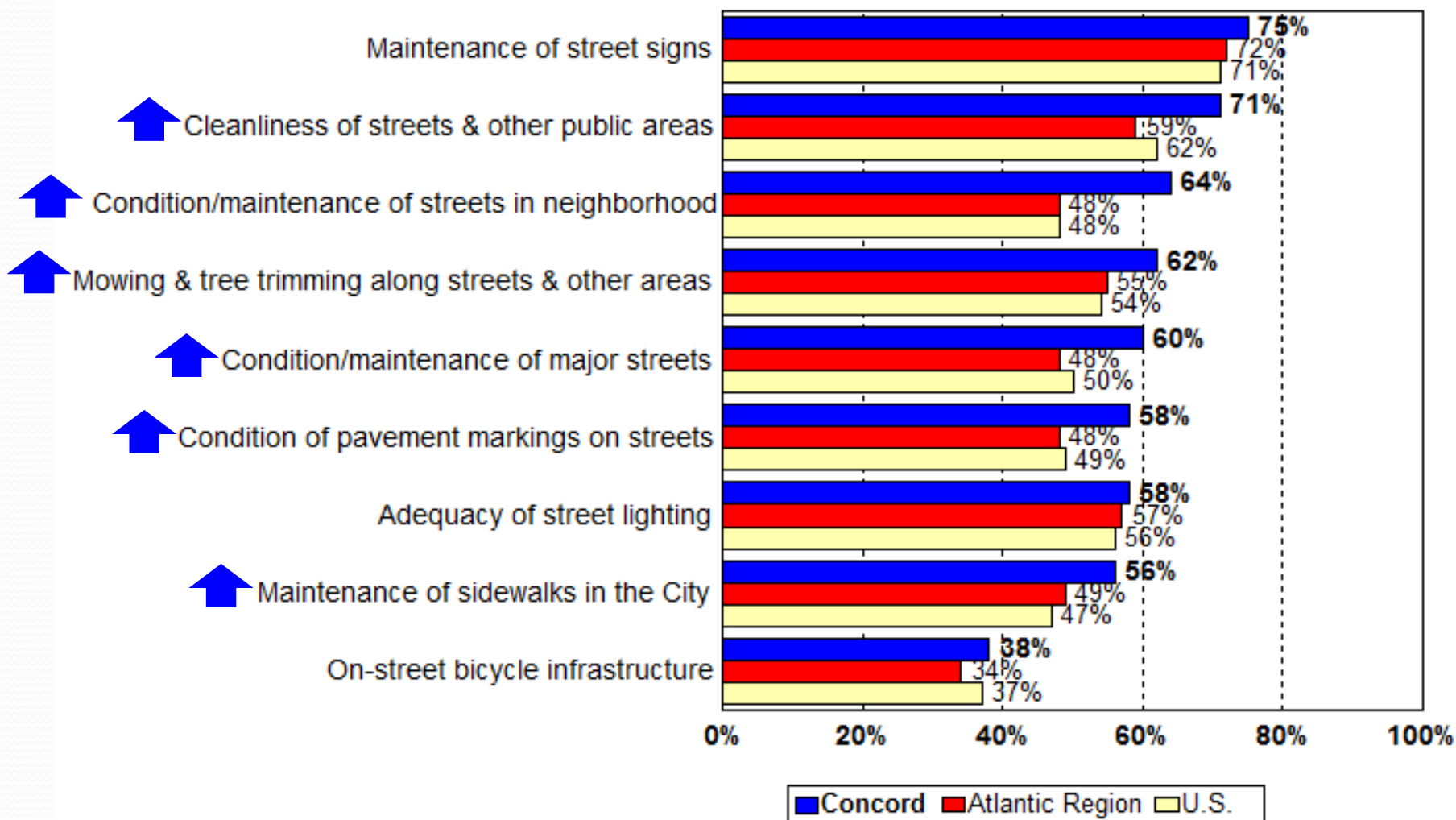
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Transportation and Roadway Services

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

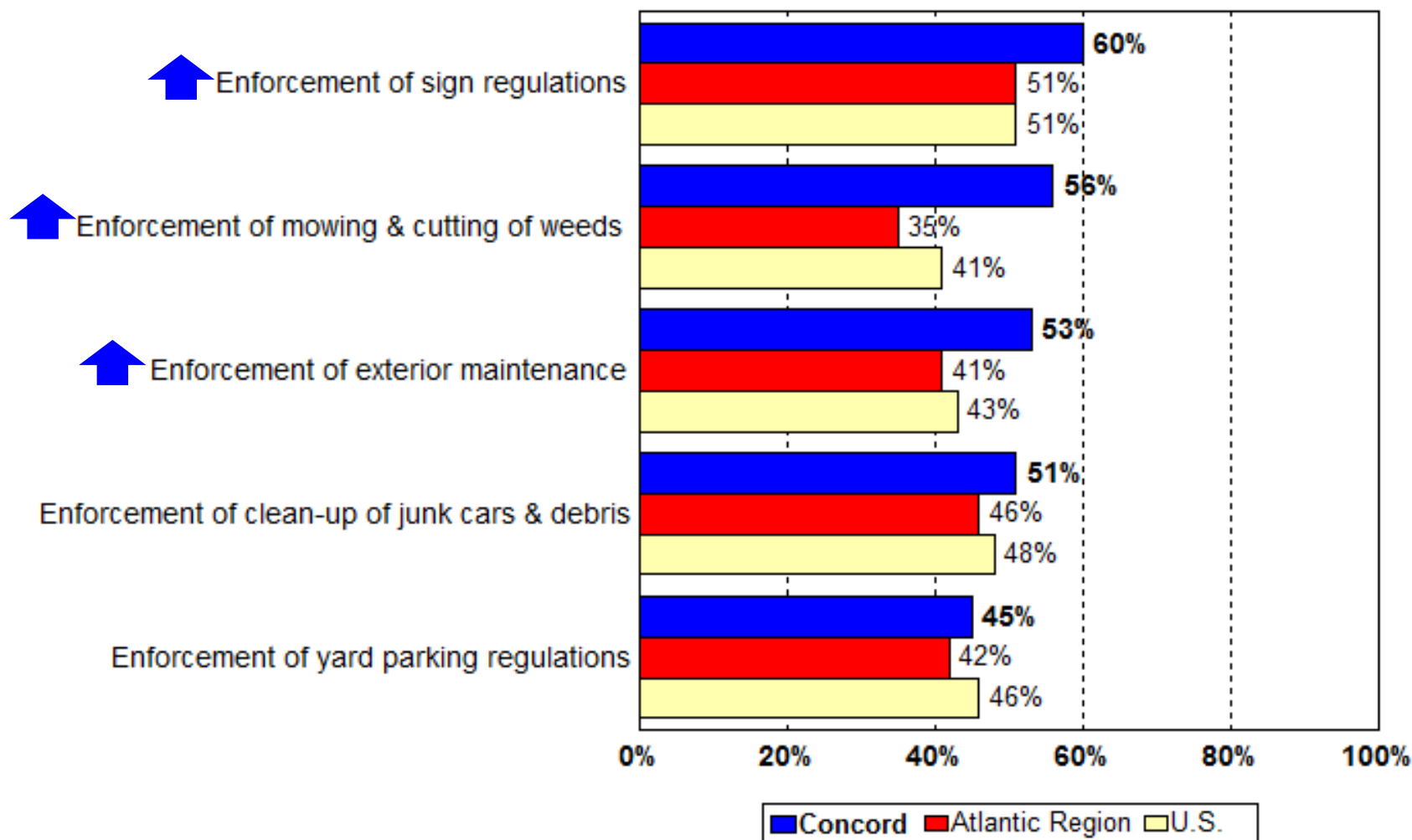
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Neighborhood Services

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

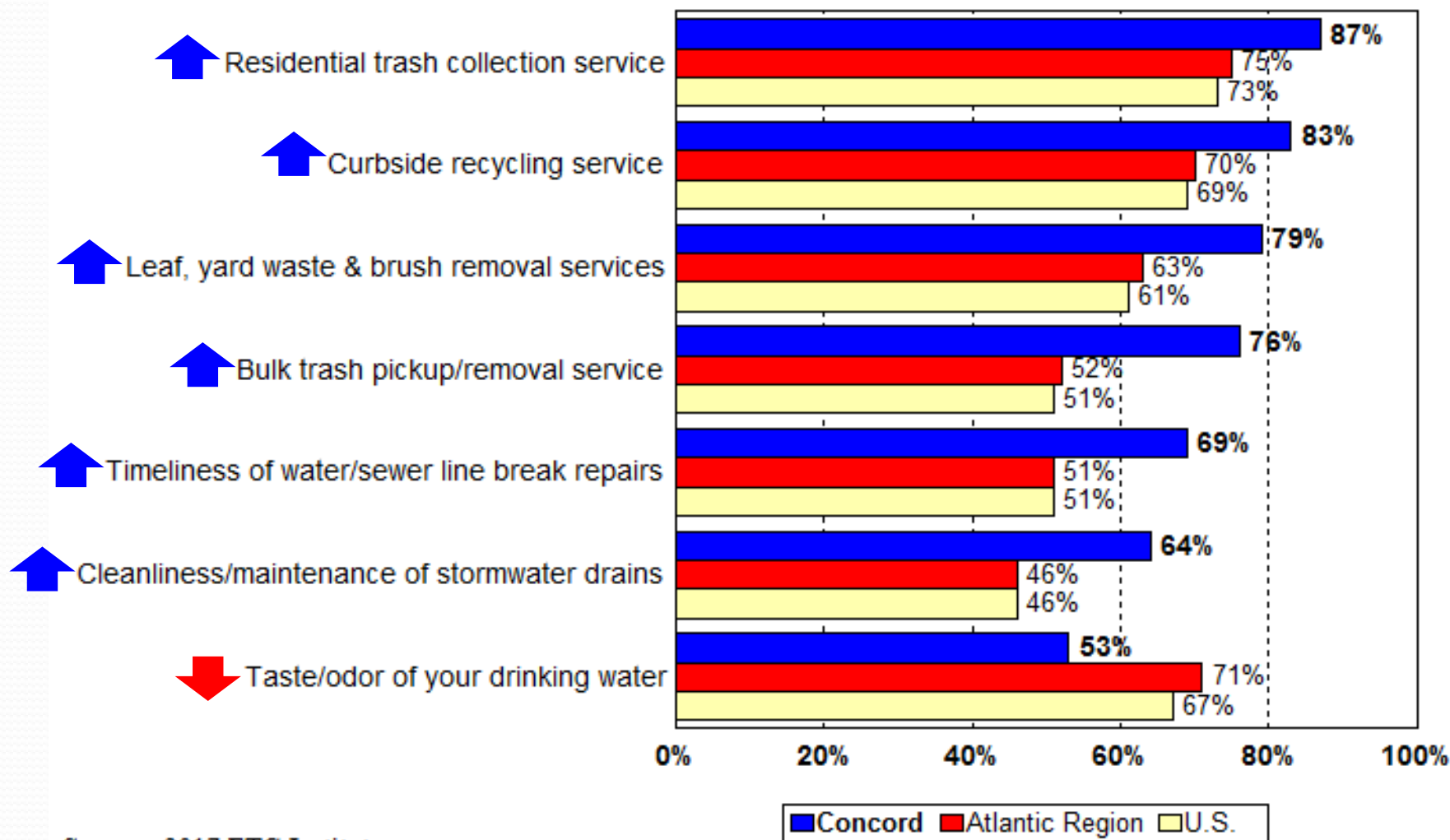
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Environmental and Utility Services

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



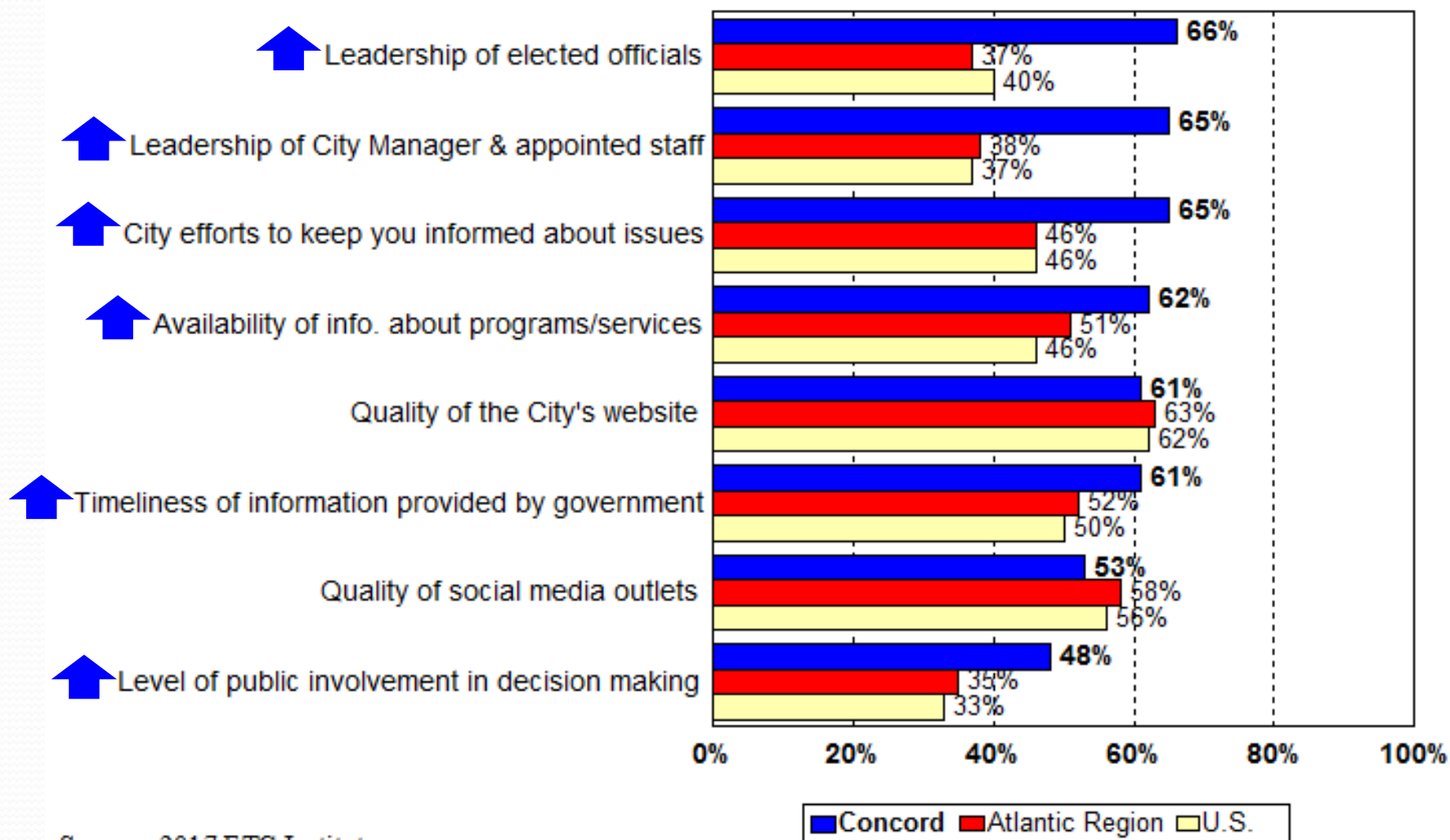
Source: 2017 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with City Leadership and Communication Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

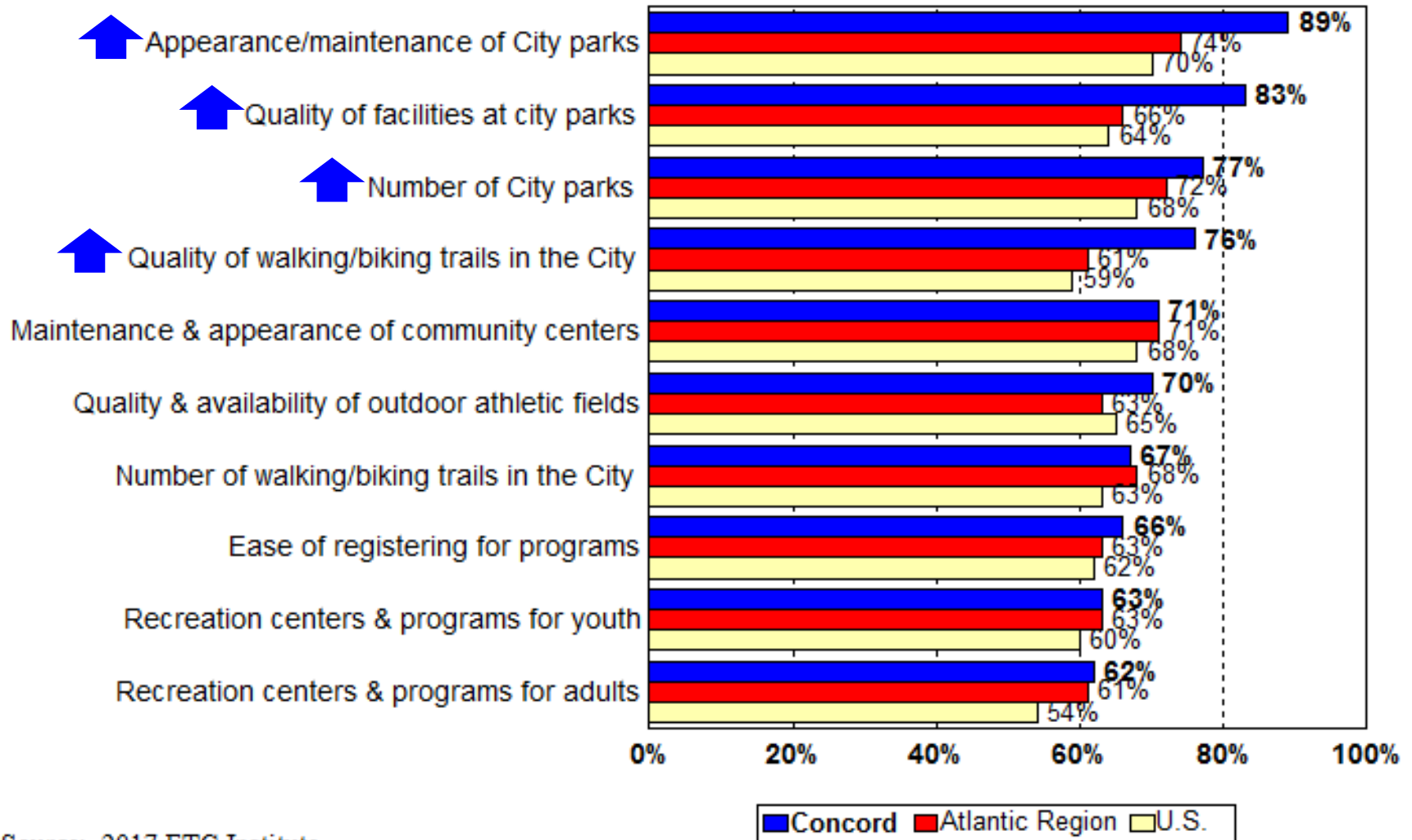
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Parks and Recreation Services

Concord vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)



Source: 2017 ETC Institute

Significantly Higher: ↑

Significantly Lower: ↓

Major Finding #4 Top Community Priorities

Importance-Satisfaction Rating

2017 City of Concord Citizen Survey

OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very High Priority (IS > .20)</u>						
Flow of traffic and the ease of getting around the City	48%	1	46%	15	0.2614	1
<u>High Priority (IS = .10-.20)</u>						
Maintenance of streets, sidewalks, and infrastructure	35%	2	60%	13	0.1408	2
<u>Medium Priority (IS < .10)</u>						
Overall quality of economic development	25%	3	61%	12	0.0963	3
Overall quality of public transportation services	13%	7	51%	14	0.0632	4
Overall quality of City water & sewer utilities	16%	5	71%	9	0.0452	5
Overall quality of police services	23%	4	81%	4	0.0428	6
Overall enforcement of City codes & ordinances	12%	9	65%	11	0.0410	7
Effectiveness of communication with the public	9%	12	72%	8	0.0241	8
Overall quality of City electrical utility services	9%	11	75%	7	0.0225	9
Quality of trash, recycling & yard waste services	11%	10	79%	6	0.0221	10
Quality of City parks & rec programs & facilities	13%	6	86%	2	0.0188	11
Quality of the City's stormwater management system	5%	13	67%	10	0.0178	12
Quality of fire services/response to emergencies	12%	8	91%	1	0.0112	13
Overall quality of customer service you receive	5%	14	81%	5	0.0089	14
Overall appearance of City facilities	3%	15	82%	3	0.0049	15

Overall Priorities:

Importance-Satisfaction Rating

2017 City of Concord Citizen Survey

Public Safety and Emergency Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS= .10-.20)						
Efforts to ensure community is prepared for crisis	26%	3	53%	18	0.1231	1
Medium Priority (IS < .10)						
Visibility of police in neighborhoods	28%	2	67%	16	0.0911	2
Overall efforts by the City to prevent crime	30%	1	74%	11	0.0790	3
Visibility of police in retail areas	21%	4	69%	13	0.0651	4
Community engagement efforts	17%	6	64%	17	0.0612	5
City efforts to enforce local traffic laws	16%	7	70%	12	0.0465	6
City public safety education programs	15%	8	69%	14	0.0456	7
Overall quality of local police protection	17%	5	83%	4	0.0296	8
Professionalism of police officers	12%	9	77%	9	0.0269	9
How quickly police respond to emergencies	8%	10	79%	6	0.0172	10
Overall quality of 911 service	4%	14	78%	8	0.0081	11
Promptness of the 911 center to answer calls	4%	13	79%	7	0.0078	12
Overall quality of fire services	7%	11	89%	1	0.0074	13
Adequacy of fire protection for your property	3%	15	79%	5	0.0071	14
Fire building inspection program	2%	16	69%	15	0.0068	15
How quickly fire personnel respond	4%	12	89%	2	0.0045	16
Professionalism of the City's 911 center	1%	17	76%	10	0.0034	17
Professionalism of fire personnel	1%	18	87%	3	0.0016	18

Public Safety Emergency Services Priorities:

Importance-Satisfaction Rating

2017 City of Concord Citizen Survey

Transportation and Roadway Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS= .10-.20)</u>						
Ease of getting across town in Concord	28%	1	57%	10	0.1213	1
<u>Medium Priority (IS < .10)</u>						
Availability of pedestrian walkways/sidewalks	18%	5	49%	12	0.0923	2
Traffic signal coordination on major streets	22%	2	59%	7	0.0890	3
On-street bicycle infrastructure	13%	10	38%	16	0.0800	4
Adequacy of street lighting	19%	3	58%	9	0.0794	5
Condition/maintenance of major streets	19%	4	60%	6	0.0748	6
Availability of public transportation services	13%	8	47%	13	0.0700	7
Accessibility of public transportation services	12%	11	44%	14	0.0683	8
Availability of public transportation links	11%	12	42%	15	0.0621	9
Condition of pavement markings on streets	13%	9	58%	8	0.0550	10
Condition/maintenance of streets in neighborhood	14%	7	64%	4	0.0493	11
Ease of traveling from home to regional roadways	15%	6	67%	3	0.0492	12
Mowing & tree trimming along streets & other areas	9%	14	62%	5	0.0350	13
Maintenance of sidewalks in the City	7%	15	56%	11	0.0326	14
Cleanliness of streets & other public areas	10%	13	71%	2	0.0276	15
Maintenance of street signs	2%	16	75%	1	0.0060	16

Transportation and Roadway Priorities:

Importance-Satisfaction Rating

2017 City of Concord Citizen Survey

Neighborhood Services

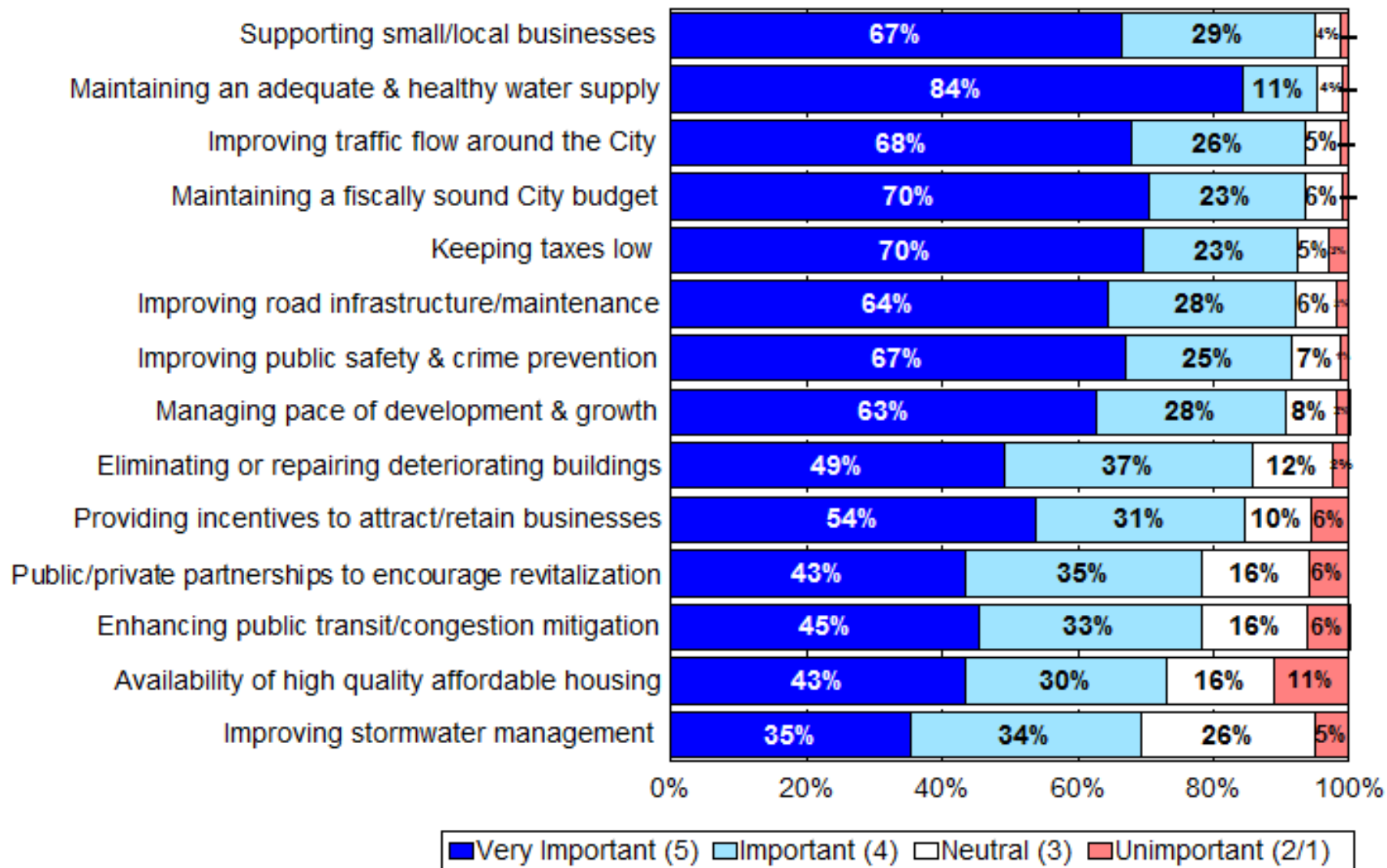
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS= .10-.20)</u>						
Availability of affordable rental housing	24%	1	28%	12	0.1721	1
Availability of affordable housing for purchase	23%	2	40%	9	0.1386	2
Quality of public housing	18%	6	31%	11	0.1270	3
Enforcement of the removal of dilapidated housing	19%	5	39%	10	0.1141	4
Enforcement of clean-up of junk cars & debris	22%	3	51%	5	0.1073	5
<u>Medium Priority (IS < .10)</u>						
Availability of programs to assist home ownership	17%	7	42%	8	0.0963	6
Enforcement of mowing & cutting of weeds	21%	4	56%	3	0.0920	7
Enforcement of the repair of substandard housing	15%	9	43%	7	0.0832	8
Enforcement of exterior maintenance	16%	8	53%	4	0.0752	9
Enforcement of yard parking regulations	8%	11	45%	6	0.0418	10
Enforcement of sign regulations	6%	12	60%	2	0.0236	11
Appearance of your neighborhood	8%	10	75%	1	0.0205	12

Neighborhood Service Priorities:

Other Findings

Q26. Importance of Various Issues for the Future

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)

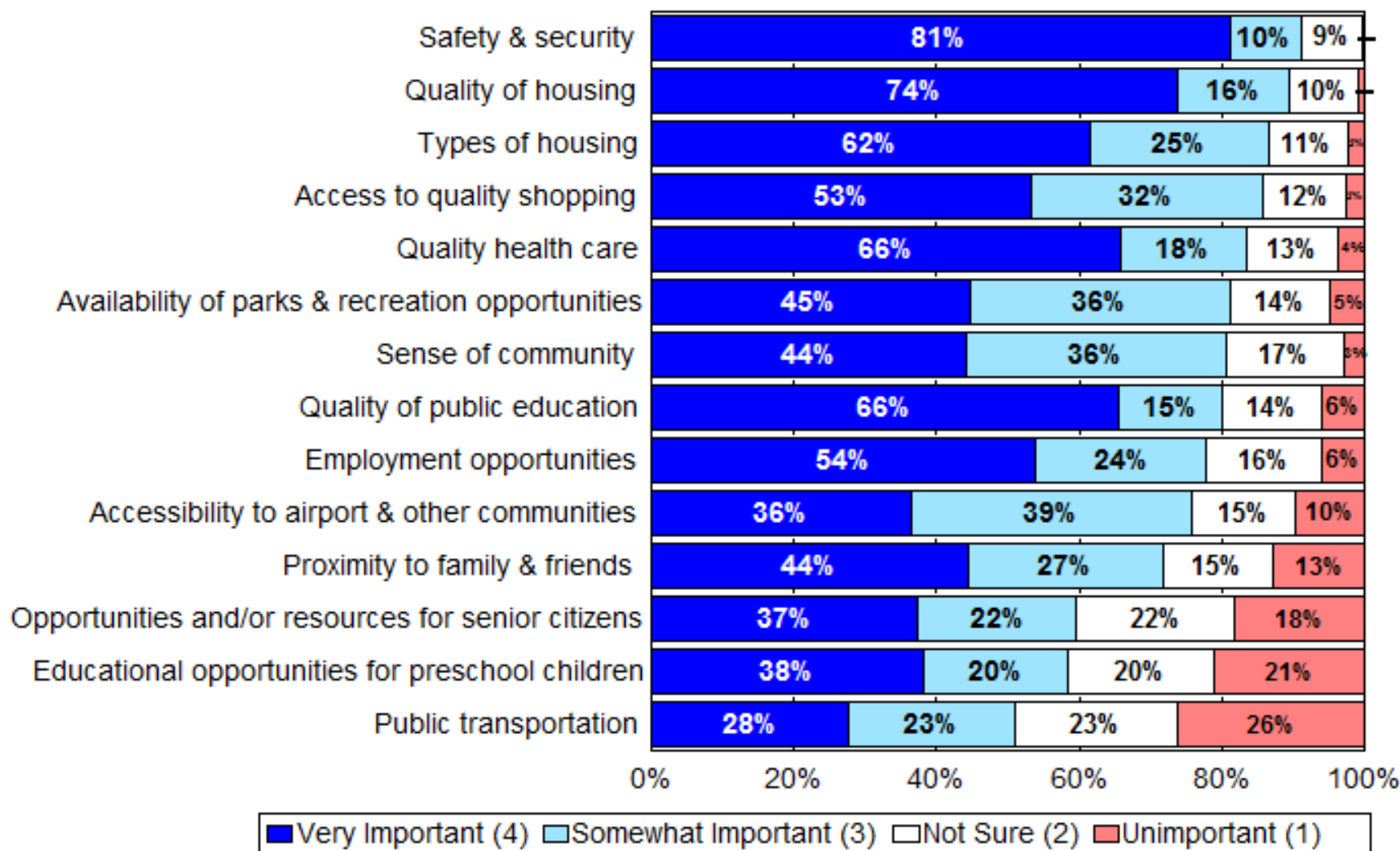


Source: ETC Institute (2017)

Residents Feel the Most Important Issues for the Future Are: 1) Supporting Small/Local Businesses, 2) Maintaining Adequate/Healthy Water and 3) Improving Traffic Flow

Q25. Importance of Various Aspects of Quality of Life

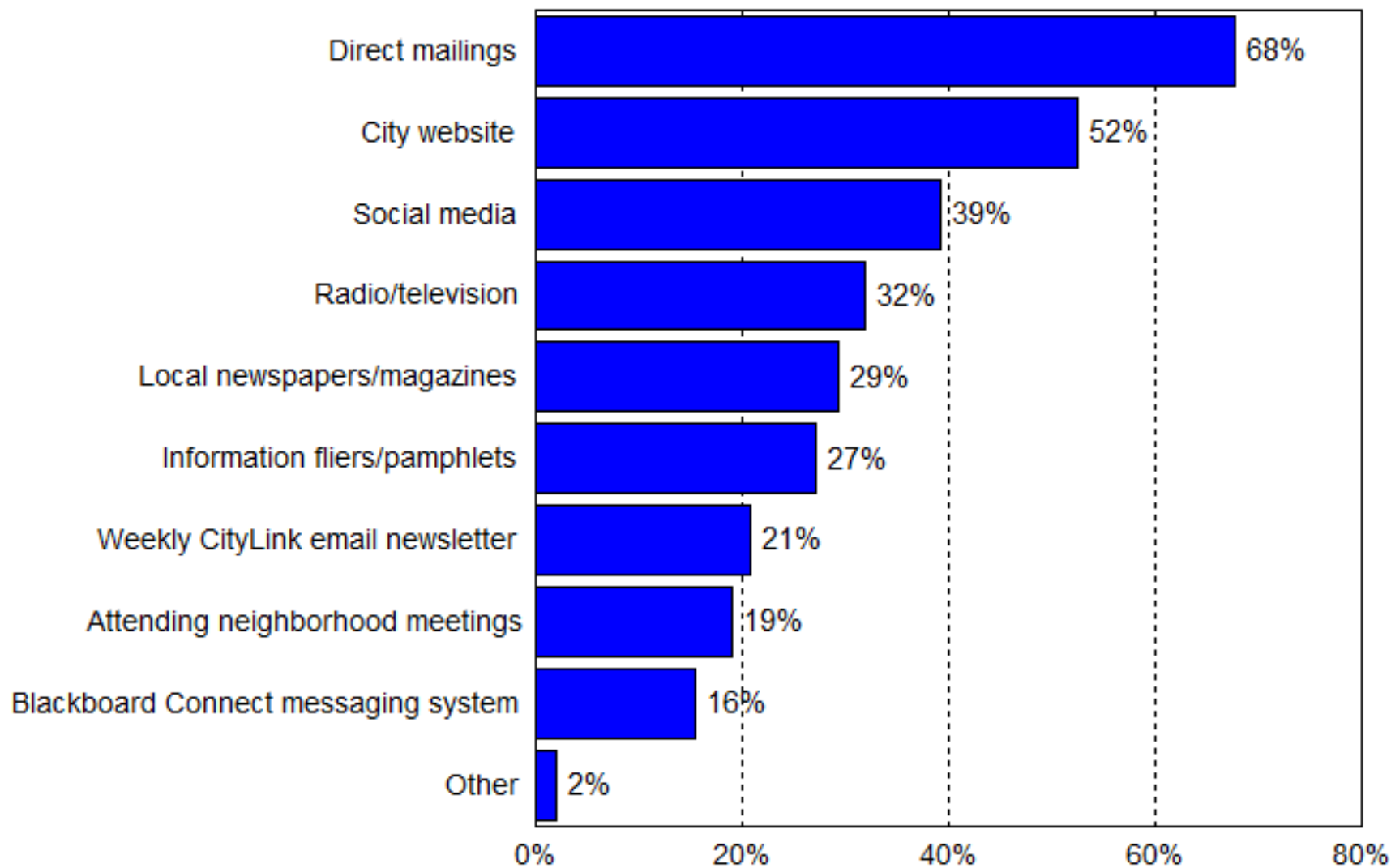
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding don't knows)



Source: ETC Institute (2017)

Q18. Good Ways to Get Information About City Projects or Issues

by percentage of respondents (multiple choices could be made)



Source: ETC Institute (2017)

Summary

- **Residents Have a Very Positive Perception of the City**
 - ❑ 90% rated the City as an excellent or good place to live
 - ❑ 84% rated the City as an excellent or good place to raise children
- **Satisfaction with City Services Is Much Higher in Concord Than Other Communities**
 - ❑ Concord rated above the U.S. Average and Regional Average in 63 of the 69 areas that were compared
 - ❑ Satisfaction with the Overall Quality of City Services rated 30% above U.S. Average and 28% above Regional Average
 - ❑ Satisfaction with Value Received for Taxes and Fees rated 22% above U.S. Average and 21% above Regional Average
- **Opportunities for Improvement That Will Have the Most Positive Impact on Overall Satisfaction Over the Next Few Years:**
 - ❑ Flow of Traffic and Ease of Getting Around the City
 - ❑ Maintenance of Streets, Sidewalks, and Infrastructure
- **Most Important Issues for the Future:**
 - ❑ Supporting Small/Local Businesses
 - ❑ Maintaining an Adequate & Healthy Water Supply
 - ❑ Improving Traffic Flow Around the City